

**REQUEST FOR PROPOSALS FOR
HEALTH AND SUPPORT SERVICES FOR
PERSONS LIVING WITH HIV/AIDS**

**MIAMI-DADE COUNTY
RYAN WHITE TITLE I PROGRAM
RFP NO. 0307**

**ATTENDANCE AT A PRE-PROPOSAL CONFERENCE IS STRONGLY
RECOMMENDED. THE PRE-PROPOSAL CONFERENCE WILL BE HELD ON
MONDAY, JULY 17, 2006, AT 10:00 A.M. (E.S.T.)
AT THE MIAMI-DADE MAIN LIBRARY
101 WEST FLAGLER STREET
MIAMI, FLORIDA 33130**

**ISSUING DEPARTMENT:
Miami-Dade County, Office of Strategic Business Management
Ryan White Title I Program
111 NW 1st Street, 22nd Floor
Miami, Florida 33128**

**RFP Contracting Officer: Theresa Fiaño, Project Director
Telephone: (305) 375-4742 Fax: (305) 375-4454**

PROPOSALS ARE DUE AT THE ADDRESS SHOWN BELOW NO LATER THAN

**Wednesday, August 23, 2006, at 2:00 P.M. (E.S.T.) AT
CLERK OF THE BOARD OF COUNTY COMMISSIONERS
STEPHEN P. CLARK CENTER
111 N.W. 1st STREET, 17TH FLOOR, SUITE 202
MIAMI, FLORIDA 33128 -1983**

**PROPOSALS WILL BE OPENED PROMPTLY AT THE TIME AND PLACE SPECIFIED. PROPOSALS
RECEIVED AFTER THE FIRST PROPOSAL HAS BEEN OPENED WILL NOT BE OPENED AND WILL
NOT BE CONSIDERED. THE RESPONSIBILITY FOR SUBMITTING A PROPOSAL TO THE CLERK OF
THE BOARD OF COUNTY COMMISSIONERS ON OR BEFORE THE STATED TIME AND DATE WILL BE
SOLELY AND STRICTLY THE RESPONSIBILITY OF THE PROPOSER. MIAMI-DADE COUNTY IS NOT
RESPONSIBLE FOR DELAYS CAUSED BY ANY MAIL, PACKAGE OR COURIER SERVICE, INCLUDING
THE U.S. MAIL, OR CAUSED BY ANY OTHER OCCURRENCE.**

**MIAMI-DADE COUNTY IS AN EQUAL OPPORTUNITY EMPLOYER AND DOES NOT DISCRIMINATE
BASED ON AGE, GENDER, RACE, OR DISABILITY.**

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SECTION 1.0 DEFINITIONS

The following words and expressions used in this Solicitation (i.e., RFP) shall be construed as follows, except when it is clear from the context that another meaning is intended:

- 1) The words "Contractor" or "Provider" to mean the Proposer that received any award of a Contract from the County as a result of this RFP, which is also to be known as "the Prime Contractor," "the Prime Consultant," or "the Service Provider."
- 2) The word "County" to mean Miami-Dade County, a political subdivision of the State of Florida.
- 3) The word "Department" to mean the Office of Strategic Business Management.
- 4) The words "Proposer," "Submitter," or "Respondent" to mean the person, firm, entity, or organization submitting a response to this RFP.
- 5) The words "Scope of Services" or "Scope of Work" to mean Section 3.0 of this RFP, which details the work to be performed by the Contractor or Provider.
- 6) The word "Solicitation" to mean this Request for Proposal (RFP) document and all associated addenda and attachments.
- 7) The words "Subcontractor" or "Subconsultant" to mean any person, firm, entity or organization, other than the employees of the Contractor or Provider, who contracts with the Contractor or Provider to furnish labor, or labor and materials, in connection with the work or services to the County, whether directly or indirectly, on behalf of the Contractor or Provider.
- 8) The words "Work," "Services," "Program," "Project," or "Engagement" to mean all matters and things that will be required to be done by the Contractor in accordance with the Scope of Services and the terms and conditions of this RFP (i.e., Solicitation).
- 9) The words "Work Order" to mean a document that defines and describes the parameters of individual projects assigned or awarded by the County to the Contractor in accordance to the terms of the Contract.

SECTION 2.0 - RFP OVERVIEW AND PROPOSAL PROCEDURES

2.1 INTRODUCTION/BACKGROUND

Miami-Dade County, hereinafter referred to as the "County," as represented by the Office of Strategic Business Management, is requesting proposals from one or more qualified public or private non-profit health and support service providers, hereinafter referred to as the "Proposer," to provide the following services to persons living with HIV or AIDS:

1) outpatient medical care*; 2) prescription drugs*; 3) dental care; 4) case management*; 5) substance abuse counseling – residential*; 6) substance abuse counseling – outpatient; 7) mental health therapy; 8) outreach services*; 9) food bank; 10) health insurance services (assistance with payment of insurance premiums through the AIDS Insurance Continuation Program, insurance deductibles, and prescription drug co-payments); 11) psychosocial support services; 12) home delivered meals; 13) legal assistance; 14) home health care; 15) day care services; 16) transportation services (vans); and 17) transportation vouchers.

All services listed above with an asterisk (*) will be funded with both General HIV/AIDS Population Ryan White Title I funds and Ryan White Minority AIDS Initiative (MAI) funds, that must be targeted specifically to minority populations, only.

Only public or private, not-for profit organizations are eligible to apply for these funds. As such, private not-for profit service providers must be able to show proof of such status by submitting appropriate documentation in the name of the proposing organization and any subcontractors, if applicable, as part of the proposal (i.e., a Letter of Determination issued by the Internal Revenue Service stating not-for-profit status). Failure to provide said documentation will deem the proposal ineligible for consideration.

For-Profit organizations are not eligible to apply for these funds. Additionally, as stated in the Health Resources Service Administration's Law & Policy: Division of Services Systems Program Policy Guidance No. 4, Clarification of Legislative Language regarding Contracting with For-Profit Entities, June 1, 2000, "Grantees must prohibit non-profit contractors from serving as conduits who pass their awards to for-profit corporations and may find it necessary to monitor membership of corporate boards in enforcing this prohibition. Federal Grants Management Policy is clear that the eligibility requirements that apply to first level entities cannot be evaded by passing awards through to second- or subsequent-level entities that could not have received awards in the original competition."

It is anticipated that the County will enter into more than one contract as a result of this RFP process. The initial term of the contract to be awarded shall commence March 1, 2007, following approval by the Board of County Commissioners, and continuing through February 29, 2008 with possible options to renew subject to receipt of sufficient funding from the Federal Government. The maximum, total dollar amount available in this RFP is approximately \$23.84 million dollars. The maximum funding allocation for each service is indicated as part of the service definition in Section 3.0, Scope of Services.

Miami-Dade County receives federal funds from the Title I - HIV Emergency Relief Grant under the Ryan White Comprehensive AIDS Resources Emergency (C.A.R.E.) Act of 1990, as amended in 1996 and 2000. This legislation represents the largest dollar investment made by the federal government specifically for the provision of services for poor or underserved members of the population with HIV infection. The purpose of the Act is to improve the quality and availability of care for individuals and families with HIV disease and establish services for persons living with HIV and AIDS who would otherwise have no access to health care and other supportive services.

Title I of this Act directs grant assistance to metropolitan areas with the largest numbers of reported cases of AIDS to meet emergency service needs. The Board of County Commissioners authorized the County Manager to apply for, receive, and subsequently disburse these funds. In accordance with the terms of Title I of the Ryan White C.A.R.E. Act, the Board of County Commissioners also created and established the Miami-Dade HIV/AIDS Partnership (Partnership), whose purpose is to determine the needs and service priorities in the community in order to properly allocate these funds; develop a comprehensive plan for the delivery of HIV health services; and assess the efficiency of the administrative mechanisms used to rapidly allocate funds to the areas of greatest need.

Miami-Dade County received \$23.999 million in total funding for Fiscal Year (FY 2006 – 07) (March 1, 2006 – February 28, 2007) from the U.S. Department of Health and Human Services, Health Resources and Services Administration (HRSA). Community members, members of the Miami-Dade HIV/AIDS Partnership, and persons living with HIV and AIDS participated in interviews, surveys, focus groups, and a quantified needs assessment, which led to the development of the information utilized by the Partnership to establish service priorities, service descriptions, price caps, medical, and economic client eligibility requirements, and the standards of service discussed in this RFP. Miami-Dade County will not have received notification of award for FY 2007 – 2008 by the time this RFP is released. Thus, award recommendations are contingent on final award notification from the Department of Health and Human Services and may be amended upwards or downwards, dependent on final award notification, expected in February 2007.

Miami-Dade County is issuing this RFP for services funded under Title I of the C.A.R.E. Act. It is the County's intention to solicit proposals from as many eligible respondents as are interested, to evaluate the proposals, to conduct oral presentations if necessary, to verify the information presented, and to negotiate and award agreements to the top ranked Proposers selected for funding. Proposers may respond to any one service, all services, or any combination thereof.

Proposers MUST have documented relevant experience in the service(s) for which they are applying for funds.

2.2 RFP TIMETABLE

The anticipated schedule for this RFP and contract approval is as follows:

1. RFP available for distribution (1:00 P.M. E.S.T.).....07/10/06
2. Pre-Proposal Conference (10 A.M. E.S.T.)..... 07/17/06
(See Section 2.5 for location)
3. Deadline for receipt of written questions (5:00 P.M. E.S.T.)..... 07/15/06
4. Deadline for receipt of proposals (2:00 P.M. E.S.T.)..... 08/23/06
(See Section 2.4 for location)
5. Evaluation/Selection process..... 08/30/06 – 10/10/06
6. Oral presentations, if conducted.....TBA
7. Projected award date..... 12/26/06
8. Projected contract start date..... 03/01/07

2.3 RFP AVAILABILITY

Copies of this RFP may be obtained by contacting or visiting:

Theresa Fiaño, Project Director
Ryan White Title I Program
Office of Strategic Business Management
111 NW 1st Street, 22nd Floor
Miami, Florida 33128
(305) 375-4742

OR

By downloading all files from the Miami-Dade County Ryan White Title I Program web site after registering as a potential proposer at: <http://www.miamidade.gov/RyanWhite/rfp.asp>.

Proposers who obtain copies of this RFP from sources other than the County's Office of Strategic Business Management or the link listed above risk the potential of not receiving addenda, since their names will not be included on the list of organizations participating in the process for this particular RFP. Such Proposers are solely responsible for those risks (see Section 2.8). Application formats and forms may not be altered or manipulated in any way.

2.4 PROPOSAL SUBMISSION

All proposals MUST be submitted on 8 1/2" X 11" paper, neatly typed on one side only, with normal margins and spacing. An unbound, one-sided original and fifteen (15) unbound copies (a total of 16) of the complete proposal must be received by Wednesday, August 23, 2006, at 2:00 P.M. (E.S.T.). The proposal will be opened by the issuing department in conjunction with the Clerk of the Board at 2:00 p.m. the same day. The original and all copies must be submitted in a sealed envelope or container stating on the outside the Proposer's name, address, telephone number, the RFP number (No. 0307), the RFP title ("Health and Support Services for Persons Living with HIV/AIDS"), and the proposal due date of Wednesday, August 23, 2006 to:

Miami-Dade County
Clerk of the Board of County Commissioners
Stephen P. Clark Center
111 N.W. 1st Street, 17th Floor, Suite 202
Miami, Florida 33128 –1983

Hand-carried proposals may be delivered to the above address **ONLY** between the hours of 8:00 A.M. and 4:30 P.M., Mondays through Fridays (however, please note that proposals are due at the Clerk of the Board of County Commissioner's Office no later than the date and time indicated above. Additionally, the Clerk of the Board is closed on holidays observed by the County. Proposers are responsible for informing any commercial delivery service, if used, of all delivery requirements and for ensuring that the required address information appears on the outer wrapper or envelope(s) used by such service.

The Proposal Title Page (Attachment 1) and the Price Forms (Attachments 18-34) must be signed by an authorized officer of the Proposer who is legally authorized to enter into a contractual relationship in the name of the Proposer, and the Proposer must affix the organization's corporate seal to these documents. In the absence of a corporate seal, the Proposal Title Page and Price Forms must be notarized by a Notary Public. The original copy of the proposal must be clearly marked as such on the envelope and on the Proposal Title Page. Additional signed copies do not need to bear original signatures, corporate seal, and/or be notarized.

The submittal of a proposal by a Proposer will be considered by the County as constituting an offer by the Proposer to perform the required service(s) at the stated fee(s)/price(s).

2.5 PRE-PROPOSAL CONFERENCE

A Pre-Proposal Conference has been scheduled for Monday, July 17, 2006 10:00 A.M. (EST). The conference will be held at the following location:

Miami-Dade Main Library
101 W Flagler Street
Miami, Florida 33130

Attendance at the Pre-Proposal Conference is **strongly recommended**. Proposers interested in attending the conference are required to inform the RFP Contracting Officer no later than 24 hours before the scheduled date. Proposers are encouraged to submit any questions in writing to the RFP Contracting Officer, Theresa Fiano, Project Director, Ryan White Title I Program, at the Office of Strategic Business Management, Fax # (305) 375-4454 or e-mail fianot@miamidade.gov. Questions must be submitted by the deadline (July 15, 2006) indicated in the RFP Timetable (see Section 2.2). Due to limited space at the conference, only two representatives from each proposing organization may attend.

2.6 **CONE OF SILENCE**

Pursuant to Section 2-11.1(t) of the Miami-Dade County Code, as amended, a "Cone of Silence" is imposed upon each RFP, RFQ or bid after advertisement and terminates at the time the County Manager issues a written recommendation to the Board of County Commissioners. The Cone of Silence **prohibits any communication** regarding RFPs, RFQs or bids between, among others:

- potential vendors, service providers, bidders, lobbyists or consultants and the County's professional staff, including, but not limited to, the County Manager and the County Manager's staff, the Mayor, County Commissioners or their respective staffs;
- the Mayor, County Commissioners or their respective staffs and the County's professional staff including, but not limited to, the County Manager and the County Manager's staff; and
- potential vendors, service providers, bidders, lobbyists or consultants, any member of the County's professional staff, the Mayor, County Commissioners or their respective staffs and any member of the respective selection committee.

The provisions do not apply to, among other communications:

- oral communications with the staff of the Vendor Information Center, the responsible Procurement Agent or Contracting Officer, provided the communication is limited strictly to matters of process or procedure already contained in the RFP document;
- oral communications at pre-proposal or pre-bid conferences, oral presentations before selection committees, contract negotiations during any duly noticed public meeting, public presentations made to the Board of County Commissioners during any duly noticed public meeting; or
- communications in writing at any time with any County employee, official or member of the Board of County Commissioners, unless specifically prohibited by the applicable RFP, RFQ, or bid document.

Proposers or bidders must file a copy of any written communications with the Clerk of the Board, which shall be made available to any person upon request. The County shall respond in writing and file a copy with the Clerk of the Board, which shall be made available to any person upon request. Written communications may be in the form of e-mail, with a copy to the Clerk of the Board at CLERKBCC@MIAMIDADE.GOV.

In addition to any other penalties provided by law, violation of the Cone of Silence by any proposer or bidder shall render any RFP award, RFQ award, or bid award voidable. Any person having personal knowledge of a violation of these provisions shall report such violation to the State Attorney and/or may file a complaint with the Ethics Commission. Proposers or bidders should reference Section 2-11.1(t) of the Miami-Dade County Code for further clarification.

This language is only a summary of the key provisions of the Cone of Silence. Please review Miami-Dade County Administrative Order 3-27 for a complete and thorough description of the Cone of Silence.

2.7 CONTRACT MEASURES

No Black/Hispanic/Women Business Enterprise measures have been assigned to this RFP.

2.8 ADDITIONAL INFORMATION / ADDENDA

Requests for additional information or clarifications must be made in writing and received by the County's Contracting Officer for this RFP, in accordance with Section 2.6 above, no later than the deadline (July 15, 2006) for receipt of questions specified in the RFP Timetable (see Section 2.2). The request needs to contain the RFP number and title, Proposer's name, name of Proposer's contact person, address, phone number, e-mail address, and facsimile number.

Electronic facsimile requesting additional information will be received by the RFP Contracting Officer at the fax number specified in Section 2.3. Facsimiles must have a cover sheet which includes, at a minimum, the Proposer's name, name of Proposer's contact person, address, numbers of pages transmitted, phone number, facsimile number, and the RFP number and title.

The County will issue responses to questions and any other corrections or amendments it deems necessary in written addenda issued prior to the proposal due date. Proposers should not rely on any representations, statements, or explanations other than those made in this RFP or in any written addendum to this RFP. Where there appears to be conflict between the RFP and any addenda issued, the last addendum issued shall prevail.

It is the Proposer's responsibility to assure receipt of all addenda. The Proposer should verify with the designated RFP Contracting Officer prior to submitting a proposal that all addenda have been received. Proposers are required to acknowledge the number of addenda received as part of their proposals (Attachment 2).

Proposers who obtain copies of this RFP from sources other than the County's Office of Strategic Business Management or Ryan White Title I web site risk the potential of not receiving addenda, since their names will not be included on the vendor distribution list for this particular RFP. Such Proposers are solely responsible for those risks.

2.9 PROPOSAL GUARANTEE DEPOSIT

No Proposal Guarantee Deposit is required for this RFP.

2.10 MODIFIED PROPOSALS

A Proposer may submit a modified proposal to replace all or any portion of a previously submitted proposal up until the proposal due date and time. The Evaluation/Selection Committee will only consider the latest version of the proposal.

2.11 WITHDRAWAL OF PROPOSALS

Proposals shall be irrevocable until contract award unless the proposal is withdrawn. A proposal may be withdrawn in writing only, addressed to the County Contracting Officer for this RFP prior to the proposal due date and time or upon the expiration of **ONE HUNDRED EIGHTY (180)** calendar days after the opening of proposals.

2.12 LATE PROPOSALS, LATE MODIFICATIONS AND LATE WITHDRAWALS

Proposals received after the proposal due date and time are late and will **NOT** be considered. Modifications received after the proposal due date and time are also late and will not be considered. Letters of withdrawal received either after the proposal due date and time or after contract award, whichever is applicable, are late and will not be considered.

Proposals will be opened promptly at the time and place specified. Proposals received after the first proposal has been opened will not be opened and will not be considered. The responsibility for submitting a proposal to the Clerk of the Board on or before the stated time and date is solely and strictly the responsibility of the Proposer. Miami-Dade County is not responsible for delays caused by any mail, package or courier service, including the U.S. mail, or caused by any other occurrence.

2.13 RFP POSTPONEMENT/CANCELLATION

The County may, at its sole and absolute discretion, reject any and all, or parts of any and all proposals; re-advertise this RFP; postpone or cancel, at any time, this RFP process; or waive any irregularities in this RFP or in the proposals received as a result of this RFP.

2.14 COSTS INCURRED BY PROPOSERS

All expenses involved with the preparation and submission of proposals to the County, or any work performed in connection therewith, shall be borne by the Proposer(s). No payment will be made for any responses received, nor for any other effort required of or made by the Proposer(s) prior to commencement of work as defined by a contract approved by the Board of County Commissioners.

2.15 BUSINESS ENTITY REGISTRATION

Miami-Dade County requires business entities to complete a registration application with the Department of Procurement Management before doing business with the County. Proposers need not register with the County to present a proposal; however, the selected Proposer(s) must register prior to award of a contract, as failure to register may result in the rejection of the Proposal. To register, or for assistance in registering, contact the Vendor Information Center (305) 375-5773.

It is the responsibility of the business entity to update and renew its application concerning any changes, such as new address, telephone number, commodities, etc. during the performance of any agreement obtained as a result of this RFP.

Section 2-11.1(d) of Miami-Dade County Code as amended by Ordinance 00-1, requires any county employee or any member of the employee's immediate family who has a controlling financial interest, direct or indirect, with Miami-Dade County or any person or agency acting for Miami-Dade County from competing or applying for any such contract as it pertains to this RFP, must first request a conflict of interest opinion from the County's Ethics Commission prior to their or their immediate family member's entering into any contract or transacting any business through a firm, corporation, partnership or business entity in which the employee or any member of the employee's immediate family has a controlling financial interest, direct or indirect, with Miami-Dade County or any person or agency acting for Miami-Dade County and that any such contract, agreement or business engagement entered in violation of this subsection, as amended, shall render this Agreement voidable. For additional information, please contact the Ethics Commission hotline at (305) 579-2593.

2.16 ORAL PRESENTATIONS

The County may require Proposers to give oral presentations, if necessary, in support of their proposals or to exhibit or otherwise demonstrate the information contained therein. If required, the presentations will be announced as indicated in this RFP Timetable (Section 2.2).

2.17 PROPOSER REGISTRATION AFFIDAVIT

Proposers are advised that in accordance with Section 2-11.1 (s) of the Code of Miami-Dade County, the attached Affidavit of Miami-Dade County Lobbyist Registration for Oral

Presentation (Attachment 3) must be completed, notarized, and included with the proposal submission. Lobbyists specifically include the principal, as well as any agent, officer or employee of a principal, regardless of whether such lobbying activities fall within the normal scope of employment of such agent, officer or employee.

Individuals substituted for or added to the presentation team after submittal of the proposal and filing by staff, must register with the Clerk of the Board and pay all applicable fees.

NOTE: Other than for the oral presentation, Proposers who wish to address the Board of County Commissioners, County Board or Committee concerning any actions, decisions or recommendations of County personnel regarding this RFP in accordance with Section 2-11.1(s) of The Code of Miami-Dade County, Florida and Ordinance 01-162 must register with the Clerk of the Board (Form BCCFORM2DOC) and pay all applicable fees.

2.18 EXCEPTIONS TO THE RFP

Proposers may take exceptions to any of the terms of this RFP unless the RFP specifically states where exceptions may not be taken. All exceptions taken, must be specific, and the proposer must indicate clearly what alternative is being offered to allow the County a meaningful opportunity to evaluate and rank proposals, and the cost implications of the exception (if any).

Where exceptions are taken, the County shall determine the acceptability of the proposed exceptions. The County, after completing evaluations, may accept or reject the exceptions. Where exceptions are rejected, the County may insist that the Proposer furnish the services or goods described herein, or negotiate an acceptable alternative.

All exceptions shall be referenced by utilizing the corresponding Section, paragraph, and page number in the RFP. However, the County is under no obligation to accept any exceptions. If no exception is stated, the County will assume that the proposer will accept all terms and conditions.

2.19 PROPRIETARY / CONFIDENTIAL INFORMATION

Proposers are hereby notified that all information submitted as part of, or in support of, proposals will be available for public inspection after opening of proposals, in compliance with Chapter 119, Florida Statutes, popularly known as the "Public Record Law."

The Proposer shall not submit any information in response to this RFP, which the Proposer considers to be a trade secret, proprietary or confidential. The submission of any information to the County in connection with this RFP shall be deemed conclusively to be a waiver of any trade secret or other protection, which would otherwise be available to Proposer. In the event that the Proposer submits information to the County in violation of this restriction, either inadvertently or intentionally, and clearly identifies that information in the proposal as protected or confidential, the County shall endeavor to redact and return that information to

the Proposer as quickly as possible, and if appropriate, evaluate the balance of the proposal. The redaction or return of information pursuant to this clause may render a proposal nonresponsive.

2.20 NEGOTIATIONS

The County may award a contract on the basis of initial offers received, without discussions. Therefore, each initial offer should contain the Proposer's best terms from a monetary standpoint.

The County reserves the right to enter into contract negotiations with the selected Proposer(s). If the County and the selected Proposer(s) cannot negotiate successful contracts, the County may terminate said negotiations and begin negotiations with another selected Proposer(s). This process will continue until contracts acceptable to the County have been executed or all Proposals are rejected. No Proposers shall have any rights against the County arising from such negotiations or termination thereof.

2.21 RIGHTS OF PROTEST

Any Proposer may protest any recommendations for contract award or rejection of all proposals in accordance with the procedures contained in Attachment 4 of this RFP. Due to specific Federal requirements on the grievance process implemented by grantees of Title I funds, Proposer(s) are advised that this process must be utilized to file a protest or grievance. Any remedies that result from the grievance process will be prospective in nature.

2.22 RULES, REGULATIONS, AND LICENSING REQUIREMENTS

The Proposer shall comply with all laws, ordinances and regulations applicable to the services contemplated herein, especially those applicable to conflict of interest and collusion. Proposers are presumed to be familiar with all Federal, State and local laws, ordinances, codes, rules and regulations that may in any way affect the goods or services offered, especially Executive Order No. 11246 entitled "Equal Employment Opportunity" and as amended by Executive Order No. 11375, as supplemented by the Department of Labor Regulations (41 CFR, Part 60), the Americans with Disabilities Act of 1990 and implementing regulations, the Rehabilitation Act of 1973, as amended, Chapter 553 of Florida Statutes and any and all other local, state and federal directives, ordinances, rules, orders and laws relating to people with disabilities.

2.23 REVIEW OF PROPOSALS FOR RESPONSIVENESS

Each proposal will be reviewed to determine if the proposal is responsive to the submission requirements outlined in the RFP. A responsive proposal is one which follows the RFP requirements, includes all required documentation, is submitted in the format outlined, is of timely submission, and has the appropriate signatures as required on each document. Failure to comply with these requirements may result in a proposal being deemed non-responsive.

2.24 CRIMINAL CONVICTION

Pursuant to Miami-Dade County Ordinance No. 94-34, "Any individual who has been convicted of a felony during the past ten years and any corporation, partnership, joint venture or other legal entity having an officer, director, or executive who has been convicted of a felony during the past ten years shall disclose this information prior to entering into a contract with or receiving funding from the County." Accordingly, Criminal Record Affidavit forms are available upon request at the Department of Procurement Management/Vendor Information Center at (305) 375-5773 for those individuals or firms requesting to disclose this information only.

2.25 INSPECTOR GENERAL REVIEWS**A. Independent Private Sector Inspector General Review**

Pursuant to Miami-Dade County Administrative Order 3-20 and in connection with any award issued as a result of this RFP, the County has the right to retain the services of an Independent Private Sector Inspector General ("IPSIG"), whenever the County deems it appropriate to do so. Upon written notice from the County, the selected Proposer shall make available, to the IPSIG retained by the County, all requested records and documentation pertaining to this RFP or any subsequent award, for inspection and copying. The County will be responsible for the payment of these IPSIG services, and under no circumstance shall the Proposer's cost/price for this RFP be inclusive of any charges relating to these IPSIG services. The terms of this provision herein, apply to the Proposer, its officers, agents, employees and assignees. Nothing contained in this provision shall impair any independent right of the County to conduct, audit or investigate the operations, activities and performance of the selected Proposer in connection with this RFP or any contract issued as a result of this RFP. The terms of this provision are neither intended nor shall they be construed to impose any liability on the County by the selected Proposer or third party.

B. Miami-Dade County Inspector General Review

According to Section 2-1076 of the Code of Miami-Dade County, as amended by Ordinance No. 99-63, Miami-Dade County has established the Office of the Inspector General which may, on a random basis, perform audits on all County contracts, throughout the duration of said contracts, except as otherwise provided below. The cost of the audit on any contract issued as a result of this RFP shall be one quarter (1/4) of one (1) percent of the total contract amount which cost shall be included in the total proposed amount. The audit cost will be deducted by the County from progress payments to the selected Proposer. The audit cost shall also be included in all change orders and all contract renewals and extensions.

Exception: The above application of one quarter (1/4) of one percent fee assessment shall not apply to the following contracts: (a) IPSIG contracts; (b) contracts for legal services; (c) contracts for financial advisory services; (d) auditing contracts; (e) facility rentals and lease agreements; (f) concessions and other rental agreements; (g) insurance contracts; (h) revenue-

generating contracts; (i) contracts where an IPSIG is assigned at the time the contract is approved by the Commission; (j) professional service agreements under \$1,000; (k) management agreements; (l) small purchase orders as defined in Miami-Dade County Administrative Order 3-2; (m) **federal, state and local government-funded grants**; and (n) interlocal agreements. **Notwithstanding the foregoing, the Miami-Dade County Board of County Commissioners may authorize the inclusion of the fee assessment of one quarter (1/4) of one percent in any exempted contract at the time of award.**

Nothing contained above shall in any way limit the powers of the Inspector General to perform audits on all County contracts, including, but not limited, to those contracts specifically exempted above.

2.26 PUBLIC ENTITY CRIMES

Pursuant to Paragraph 2(a) of Section 287.133, Florida Statutes, a person or affiliate who has been placed on the convicted vendor list following a conviction for a public entity crime may not submit a proposal for a contract to provide any goods or services to a public entity; may not submit a proposal on a contract with a public entity for the construction or repair of a public building or public work; may not submit proposals on leases of real property to a public entity; may not be awarded or perform work as a contractor, supplier, subcontractor, or consultant under a contract with any public entity; and, may not transact business with any public entity in excess of the threshold amount provided in Section 287.017 for CATEGORY TWO (\$10,000) for a period of thirty-six (36) months from the date of being placed on the convicted vendor list.

2.27 REQUIRED LISTING OF SUBCONTRACTORS AND SUPPLIERS ON COUNTY CONTRACTS

Miami-Dade County Ordinance 97-104, amended by Ordinance 00-30, requires a bid or proposal for a County or Public Health Trust contract involving the expenditure of \$100,000 or more to include a listing of subcontractors and suppliers who will be used on the contract. The required listing must be filed prior to the contract award. The required listing must be submitted even though the Proposer will not utilize subcontractors or suppliers on the contract. In the latter case, the listing must expressly state no subcontractors, or suppliers, as the case may be, will be used on the contract.

ATTACHMENT 5, OR A COMPARABLE LISTING MEETING THE REQUIREMENTS OF ORDINANCE NO. 97-104, AS AMENDED BY ORDINANCE NO. 00-30, MUST BE COMPLETED AND SUBMITTED EVEN THOUGH THE PROPOSER(S) MAY NOT UTILIZE SUBCONTRACTORS OR SUPPLIERS FOR THIS PROPOSAL. THE PROPOSER(S) SHOULD ENTER THE WORD "NONE" UNDER THE APPROPRIATE HEADING(S) ON ATTACHMENT 5 IN THOSE INSTANCES WHERE NO SUBCONTRACTORS AND/OR SUPPLIERS WILL BE USED ON THIS PROPOSAL.

2.28 FAIR SUBCONTRACTING POLICIES (Ordinance 97-35)

All selected Proposers on County contracts in which subcontractors may be used shall be subject to and comply with Ordinance 97-35 as amended, requiring Proposers to provide a detailed statement of their policies and procedures for awarding subcontracts which:

- a) notifies the broadest number of local subcontractors of the opportunity to be awarded a subcontract;
- b) invites local subcontractors to submit bids/proposals in a practical, expedient way;
- c) provides local subcontractors access to information necessary to prepare and formulate a subcontracting bid/proposal;
- d) allows local subcontractors to meet with appropriate personnel of the proposer to discuss the Proposer's requirements; and
- e) awards subcontracts based on full and complete consideration of all submitted proposals and in accordance with the Proposer's stated objectives.

All Proposers seeking to contract with the County shall, as a condition of award, provide a statement of their subcontracting policies and procedures (see Attachment 6). Proposers who fail to provide a statement of their policies and procedures may not be recommended by the County Manager for award by the Board of County Commissioners.

The term "local" means having headquarters located in Miami-Dade County or having a place of business located in Miami-Dade County from which the contract or subcontract will be performed.

The term "subcontractor" means a business independent of a Proposer that may agree with the Proposer to perform a portion of a contract.

The term "subcontract" means an agreement between a Proposer and a subcontractor to perform a portion of a contract between the Proposer and the County.

2.29 AFFIRMATIVE ACTION / NON-DISCRIMINATION OF EMPLOYMENT, PROMOTION AND PROCUREMENT PRACTICES (Ordinance No. 98-30)

In accordance with the requirements of County Ordinance No. 98-30, all firms with annual gross revenues in excess of \$5 million seeking to contract with Miami-Dade County shall, as a condition of award, have a written Affirmative Action Plan and Procurement Policy on file with the County's Department of Business Development. Said firms must also submit, as a part of their proposals/bids to be filed with the Clerk of the Board, an appropriately completed and signed Affirmative Action Plan/Procurement Policy Affidavit (see Attachment 7). Firms whose Board of Directors are representative of the population make-up of the nation are exempt from this requirement and must submit, in writing, a detailed listing of their Boards of Directors, showing the race or ethnicity of each board member, to the County's Department of Business Development. Firms claiming exemption must submit, as part of their proposals/bids to be filed with the Clerk of the Board, an appropriately completed and signed Exemption Affidavit (see Attachment 8) in accordance with Ordinance No. 98-30. These submittals shall be subject to periodic reviews to assure that the

entities do not discriminate in their employment and procurement practices against minorities and women-owned businesses.

It will be the responsibility of each firm to provide verification of their gross annual revenues to determine the requirement for compliance with the Ordinance. Those firms that do not exceed \$5 million annual gross revenues must clearly state so in their bid/proposal.

2.30 AFFIDAVIT - PAID FEES, TAXES, PARKING TICKETS AND OBLIGATIONS ARE NOT IN ARREARS

In accordance with Section 2-8.1 (c) of the Miami-Dade County Code, and as amended by County Ordinance No. 00-30; and Section 2-8.1(h) as amended by Ordinance No. 00-67, the Proposer shall certify that all delinquent and currently due fees, taxes and parking tickets have been paid and that the Proposer is not in arrears on obligations to the County (see Attachment 9).

2.31 CODE OF BUSINESS ETHICS

In accordance with section 2-8.(1) of the Code of Miami-Dade County each person or entity that seeks to do business with Miami-Dade County shall have or shall adopt a Code of Business Ethics ("Code") and shall, prior to execution of any contract between the contractor and the County, submit an affidavit stating that the contractor has adopted a Code that complies with the requirements of Section 2-8.1(i) of the Miami-Dade County Code (Attachment 10). Any person or entity that fails to submit the required affidavit shall be ineligible for contract award.

2.32 BANKRUPTCY

Any Proposer who, at the time of proposal submission, is involved in an ongoing bankruptcy as a debtor, or in a reorganization, liquidation, or dissolution proceeding, or if a trustee or receiver has been appointed over all or a substantial portion of the property of the Proposer under federal bankruptcy law or any state insolvency law, may be non-responsive.

2.33 DOMESTIC VIOLENCE LEAVE AFFIDAVIT

Prior to entering into any contract with the County, a firm desiring to do business with the County shall, as a condition of award, certify that it is in compliance with the Domestic Leave Ordinance, 99-5 and Section 11A-60 of the Miami-Dade County Code (Attachment 11). This Ordinance applies to employers that have, in the regular course of business, fifty (50) or more employees working in Miami-Dade County for each working day during each of twenty (20) or more calendar work weeks in the current or preceding calendar year. In accordance with Resolution R-185-00, the obligation to provide domestic violence leave to employees shall be a contractual obligation. The County shall not enter into a contract with any firm that has not certified its compliance with the Domestic Leave Ordinance. Failure to comply with the requirements of Resolution R-185-00, as well as the Domestic Leave

Ordinance may result in the contract being declared void, the contract being terminated and/or the firm being debarred.

2.34 ORDINANCES, RESOLUTIONS AND/OR ADMINISTRATIVE ORDERS

To request a copy of any ordinance, resolution and/or administrative order cited in this Solicitation, the Proposer must contact the Clerk of the Board at (305) 375-5126.

2.35 DISABILITY NONDISCRIMINATION AFFIDAVIT

Proposers must complete the attached Disability Nondiscrimination Affidavit (Attachment 12) certifying that their organization, and any subcontractor or third party under this project, is in compliance with and agrees to continue to comply with all requirements of the Americans with Disabilities Act (ADA). This shall include but will not be limited to posting a notice informing service recipients and employees that they may file any complaints of ADA violations directly with Theresa Fiaño, RFP Contracting Officer, at the Miami-Dade County Office of Strategic Business Management, Ryan White Title I Program, 111 NW 1st Street, 22nd Floor, Miami, Florida 33128.

2.36 DISQUALIFICATION OF PROPOSALS

Due to Federal requirements, the Proposer(s) **MUST** submit a categorical (line-item) budget (Attachment 13) and narrative justification using the object class categories listed below. (Attachment 14) provides a set of guidelines for the preparation of a budget justification as well as examples of allowable direct and indirect costs for each Title I service category. All expenses associated with the provision of the proposed service(s), including indirect costs, must be presented on the budget form using the object class categories identified below. Failure to submit the categorical budget with your proposal will **DISQUALIFY** your submittal from consideration by the Evaluation/Selection Committee for award of funds.

Object Class Categories: 1.) Personnel (Salaries and Fringe benefits); 2.) Contractual Expenses; 3.) Supplies; 4.) Travel (local travel only); 5.) Equipment; 6.) Other Direct Costs; and 7.) Total Indirect/Administrative Charges (Proposers are required to identify individual administrative costs under object class categories 1 through 6 above, and indicate the total sum of these costs **not to exceed ten (10) percent of the total grant request for a specific service**).

2.37 MIAMI-DADE COUNTY VENDOR INFORMATION CENTER

The Departments of Procurement Management and Business Development are pleased to announce the availability of the Miami-Dade County Vendor Information Center (VIC), located at 111 N.W. 1st Street, 13th Floor, Miami, Florida, 33128 (Attachment 15). The VIC provides information and assistance in doing business with Miami-Dade County, vendor registration and certification, and current contracting opportunities Countywide.

In addition, the VIC offers bid and proposal preparation workshops on the 2nd and 3rd Tuesdays of each month, respectively. These workshops are free of charge. For more information, please call the VIC at (305) 375-5773.

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SECTION 3.0 SCOPE OF SERVICES

3.1 GENERAL PHILOSOPHY OF SERVICE PROVISION

In order to insure comprehensive, continuous, and integrated care, the successful Proposer(s) will be required to commit to a coordinated case management system that promotes high standards of service and care, staff training, and the development of service linkages and referral mechanisms among participating care providers and key points of entry into the health care system including, but not limited to hospitals, emergency rooms, sexually transmitted disease clinics, adult and juvenile detention centers and correctional facilities; HIV counseling and testing sites, mental health clinics, and substance abuse treatment providers. Proposer(s) should maintain an overall philosophy that HIV infection is a chronic illness in which, with proper management, the client's quality of life can, in many cases, be improved and maintained over an extended period of time. Proposers should also maintain an overall philosophy of inclusion and non-discrimination to service providers, minorities, persons living with HIV/AIDS, and the public. Proposers must also show sensitivity to HIV/AIDS issues and cultural differences. The goal of the Miami-Dade County Continuum of Care is to achieve 100% access to quality care and 0% disparity in health outcomes among HIV-infected individuals, especially among communities of color.

3.2 PRIORITIES & SERVICE PROVISION REQUIREMENTS

The services included in this RFP will be provided with priority to underserved medically indigent individuals living with HIV and/or AIDS who meet current Federal Poverty Guidelines (Attachment 16), and who, after proper screening for eligibility under other benefit programs, do not qualify fully or partially to receive these services outside of Ryan White Title I. Services may also be provided to non-indigent clients, but such client's economic conditions must meet current Federal Poverty Guidelines and be charged fees based on a sliding-fee schedule that meets current Federal guidelines. Recipients of Ryan White Title I services must be permanent residents of Miami-Dade County. No cash may be provided to clients.

3.3 SPECIAL POPULATIONS & GEOGRAPHIC ACCESSIBILITY

Proposer(s) must demonstrate the capacity to serve clients from a geographic area beyond that of a local neighborhood, and to do so in keeping with the cultural/ethnic sensitivities of the population(s) to be served. Furthermore, special attention must be given to underserved populations, such as, low-income uninsured and medically indigent individuals and families, including women, children, youth, communities of color particularly the African-American, Haitian, and Hispanic communities, pediatric and homeless populations, migrant farm workers, youth, men who have sex with men, hemophiliacs, sex workers, formerly incarcerated persons, and substance abusers.

Favorable consideration will be given to Proposers that demonstrate the ability to offer services in sites located within the major centers of the epidemic in Miami-Dade County or

in areas that have historically been underserved. According to the Miami-Dade HIV/AIDS Partnership's most recent Needs Assessment, based on Miami-Dade County Health Department data, the areas with the highest numbers of people diagnosed with HIV are: Liberty City, North Miami, Little Haiti, El Portal, Miami Shores, Brownsville, Model City, Allapattah, Wynwood, and Miami Beach. Areas of the County with a large proportion of HIV-infected persons as compared to the general population are Hialeah, Miami Lakes, Miami Springs, Carol City, Opa Locka, North Miami Beach, Little Havana, Overtown, and the Roads.

3.4 CLIENT ELIGIBILITY CRITERIA

Successful proposers must document that clients who will receive Title I-funded services have a Title I Certified Referral or have documentation on file that the client to be served:

- Is HIV positive or has AIDS
- Has a documented household income that does not exceed 300% of the Federal Poverty Level
- Is a permanent resident of Miami-Dade County
- Is documented as having been properly screened for the State AIDS Drug Assistance Program (ADAP), Medicaid, Medically Needy, Medicaid Waiver, Medicare, and other public sector funding as appropriate. While clients qualify for and can access other sources of benefits/entitlement programs, they will not be eligible for Ryan White Title I funding, except for those services, tests, and/or procedures, etc. not covered by other funding sources.

PLEASE NOTE: Several service categories (i.e., day care, home health care, home-delivered meals, legal assistance, and transportation services, etc.) have more restrictive client eligibility criteria. Carefully review the service category descriptions for additional information.

3.5 CLIENT FINANCIAL ELIGIBILITY

Service providers should consider, as part of the client's financial screening, any and all "out of pocket" medical expenses incurred by the client in relation to his/her care. These expenses must be documented and the appropriate deduction must be made from the client's income in order to accurately determine his/her eligibility for Title I services.

3.6 MINORITY AIDS INITIATIVE (MAI) REQUIREMENTS

Funding available under the MAI for outpatient medical care (primary and specialty care), prescription drugs, case management, substance abuse counseling (residential), and outreach services are identical to general Title I-funded services, except that MAI services provide culturally sensitive services that target minority communities exclusively.

Title I MAI funds are designated to reduce HIV-related health disparities and improve health

outcomes for HIV+ minorities such as Black/African-Americans (including Haitians), Hispanics, Native Americans, and Asian/Pacific Islanders.

Favorable consideration will be given to providers who qualify as “Minority Community Based Organizations” by:

- 1) Having more than 50% of positions on the executive board or governing body filled by persons of the racial/ethnic minority group(s) to be served AND/OR
- 2) Having more than 50% of key management, supervisory, and administrative positions (e.g., executive director, program director, fiscal director) and more than 50% of key service provision positions (e.g., outreach worker, case manager, counselor) filled by persons of the racial/ethnic population(s) to be served.

In addition, per Federal requirements, organizations funded to provide MAI services must meet the following criteria:

- 1) Are located in or near to the targeted community they are intending to serve;
- 2) Have a documented history of providing services to the targeted community(ies);
- 3) Have documented linkages to the targeted populations, so that they can help close the gap in access to service for highly impacted communities of color; and
- 4) Provide services in a manner that is culturally and linguistically appropriate.

Proposers must clearly specify the target population(s) to be served [i.e., Black/African-American (including Haitian), Hispanics, Native Americans, etc.]. If more than one racial/ethnic group is targeted, the percentage that each group will represent of the total number of clients to be served must be identified. Additionally, all MAI funds must be accounted for separately from General HIV/AIDS Population funding, and separately by each racial/ethnic group served.

3.7 SERVICE DELIVERY STANDARDS

All successful proposers will adhere to the Ryan White Title I System Wide Standards of Care (Attachment 35) and other applicable standards and guidelines that are relevant to individual service categories (i.e., Coordinated Case Management Standards, Public Health Service Clinical Guidelines for the Treatment of AIDS-Related Disease, etc.)

The Ryan White Title I System-wide Standards of Care will form the basis for on-going monitoring and evaluation of funded service providers in FY 2007-08 by the Miami-Dade County Office of Strategic Business Management, Ryan White Title I Program. It is not expected that contracted organizations be in full compliance with these standards at the time of contract execution. It is expected, however, that the service provider has read and

understands the standards, and by signing a contract the provider is agreeing to make every effort to progress towards full compliance with these standards. The County recognizes that progress towards achieving compliance with the standards will differ from one service provider to another, both in terms of rate of progress and substance.

3.8 PERFORMANCE IMPROVEMENT AND OUTCOME MEASURES

All successful proposers will develop internal performance improvement programs and collaborate with the Miami-Dade County Ryan White Title I Quality Management Program. Providers will be evaluated against the outcome measures contained in the Performance Improvement Plan (PIP) (Attachment 36) and its addenda, including outcome measures definitions. They will be responsible for collecting and reporting on specific data to measure performance, as detailed in the PIP.

3.9 REPORTING

The successful proposer must report monthly activity according to the recorded number of client visits, dates of service, types of procedures (if applicable), the units of service provided, and the unduplicated number of clients served.

3.10 SCOPE OF SERVICES REQUESTED

The following service category descriptions are summarized for the purpose of this RFP. More detailed descriptions can be found in the document titled, "Ryan White Title I Service Delivery Policies Fiscal Year 2007 – 08 (Year 17)," which is available to download from the RFP web site link listed in Section 2.3 and available to pick up at Miami-Dade County's Office of Strategic Business Management, 111 NW 1st Street, 22nd Floor, Miami, FL 33128. These Service Delivery Policies include a) Program Requirements, b) Additional Service Delivery Standards, c) Rules for Reimbursement, and d) Additional Rules for Reporting. **Proposers are strongly encouraged to read the in-depth service category descriptions from this document before responding to this RFP.**

The anticipated maximum dollar amount available for each service category appears at the end of each service description and a summary of reimbursement rates and client eligibility criteria is provided as Attachment 17.

THE FOLLOWING SERVICES ARE AVAILABLE FOR FUNDING UNDER THIS REQUEST FOR PROPOSAL. (PLEASE NOTE THAT SERVICES THAT ARE FUNDED WITH MINORITY AIDS INITIATIVE DOLLARS ARE IDENTICAL TO GENERAL HIV/AIDS POPULATION TITLE I-FUNDED SERVICES BUT MUST ADDRESS THE PROPOSED SERVICES SEPARATELY IN DISTINCT SECTIONS. PROPOSALS MUST INCLUDE SEPARATE PROPOSED SERVICE NARRATIVES, BUDGETS, BUDGET JUSTIFICATIONS, ETC., EACH CLEARLY IDENTIFYING THE TYPE OF FUNDING REQUESTED AND THE SPECIFIC MINORITY POPULATION(S) TO BE SERVED, IF APPLICABLE. FUNDS ARE AWARDED

SEPARATELY FOR EACH TYPE OF PROGRAM (GENERAL HIV/AIDS POPULATION AND MAI):**1. Outpatient Medical Care**

This service includes outpatient Primary and Specialty Care for the provision of professional diagnostic and therapeutic services rendered by a physician, physician's assistant, clinical nurse specialist, or nurse practitioner in an outpatient setting. This service includes diagnostic testing, early intervention and risk assessment, preventive care and screening, practitioner examination, medical history taking, diagnosis and treatment of common physical and mental conditions, prescribing and managing medication therapy, education and counseling on health issues, well-baby care, continuing care and management of chronic conditions, and referral to a provision of specialty care, as necessary. Primary medical care for the treatment of HIV infection includes the provision of care that is consistent with the Public Health Service's Treatment Guidelines and must include access to antiretroviral and other drug therapies, including prophylaxis and treatment of opportunistic infections.

Allocation: Based on the Miami-Dade HIV/AIDS Partnership's FY 2007 - 08 allocations for Outpatient Medical Care, the maximum amount of Title I funds available in this RFP to provide Outpatient Medical Care to the General HIV/AIDS Population is \$8,922,101 and the maximum amount of funds available to serve MAI Minority Populations with MAI funds is \$642,607.

Providers are required to specify as part of their proposal the type of funding that is being requested, either general Title I funding or MAI funding. If both types of funding are requested, the proposal must address the proposed services separately in distinct sections. Proposals must include separate proposed service narratives, budgets, budget justifications, etc., each clearly identifying the type of funding requested. Funds are awarded separately for each type of program (General Population HIV/AIDS Outpatient Medical Care and MAI Outpatient Medical Care).

2. Prescription Drugs

This service includes the provision of injectable and non-injectable Prescription Drugs, pediatric formulations, and non-prescription nutritional supplements, appetite stimulants, and/or related supplies prescribed or ordered by a physician to prolong life, improve health, or prevent deterioration of health for HIV+ persons who do not have prescription drug coverage and who are ineligible for Medicaid or other public sector funding. This service area also includes assistance for the acquisition of non-Medicaid reimbursable drugs, as well as the purchase of consumable medical supplies and durable medical equipment that are required to administer prescribed medications.

There are three different types of providers who may apply for these funds: 1) Federally Qualified Health Centers [FQHCs] who are a covered entity under the federal 340B Drug

Pricing Program and have a not-for-profit in-house pharmacy for their eligible Title I clinic clients; 2) State AIDS Drug Assistance Programs who can offer countywide coverage under the federal 340B Pricing Program; and 3) Public or Not-for-profit organizations who can offer countywide service coverage and must specify provisions for home delivery of medications and related supplies and equipment for eligible Title I clients who require this service. FQHC and ADAP providers (1 and 2) must offer services using 340B Public Health Service (PHS) pricing. Providers that fall under the third category are allowed to offer both PHS and Average Wholesale Price (AWP) pricing options described below, unless they are also a 340B covered entity, in which case they must offer services using 340B PHS pricing.

Contracts will further stipulate that the service provider must be linked to an existing case management system through agreements with multiple case management providers, that a Title I Certified Referral (Attachment 41) and a Title I Intake Form (Attachment 38) must be completed by a case manager and must be attached to the prescription presented by the client or a designee.

The Certified Referral Form must include a client ID number traceable to the case management agency initiating the referral and a client CIS number assigned by the Title I Service Delivery Information System. The referring case management agency would be responsible for collecting and reporting all required documentation and demographic information. Providers will be contractually required to enter into formal referral agreements that will detail responsibilities of both parties and penalties for not complying with the referral agreement.

Units of Service for Reimbursement: The two (2) different unit costs for this service must utilize the following methodology(ies), as applicable to their provider type:

- 1) Providers will be reimbursed for prescription drugs, including protease inhibitors, based on the Average Wholesale Price (AWP) of the prescription provided to the Title I patient, minus a per-prescription discount rate. Total costs should include the cost of home delivery. Providers must stipulate the discount rate that they will be subtracting from the AWP, which may not be less than 10%. (For example, if the AWP of a prescription for Ritonavir is \$100, and your proposed discount rate is 10%, then the straight rate is equal to \$90.00.) An estimate of the number of patients (unduplicated caseload) expected to receive these services must be included on the price form (Attachment 19a; if applying for MAI Prescription Drugs Services use Attachment 19d).
- 2) Providers will be reimbursed for prescription drugs, including protease inhibitors, based on the Public Health Services (PHS) 340B Drug Pricing Program price of the prescription provided to the Title I patient, plus a flat dispensing fee. Total costs should include the cost of home delivery and other direct costs associated with the provision of this service. Providers must stipulate a flat rate that will be added to the PHS price. (For example, if the PHS of a prescription for Ritonavir

is \$20, and your proposed flat rate is \$5.00 then the straight rate is equal to \$25.00.) An estimate of the number of patients (unduplicated caseload) expected to receive these services must be included on the price form (Attachment 19b; if applying for MAI Prescription Drugs Services use Attachment 19e).

Allocation: Based on the Miami-Dade HIV/AIDS Partnership's FY 2007 – 08 allocations for Prescription Drugs, the maximum amount of Title I funds available in this RFP to provide Prescription Drug Services to the General HIV/AIDS Population is \$3,193,119 and the maximum amount of funds available to serve MAI Minority Populations is \$386,793.

Providers are required to specify as part of their proposal the type of funding that is being requested, either general Title I funding or MAI funding. If both types of funding are requested, the proposal must address the proposed services separately in distinct sections. Proposals must include separate proposed service narratives, budgets, budget justifications, etc., each clearly identifying the type of funding requested. Funds are awarded separately for each type of program (General HIV/AIDS Population Prescription Drug Services and MAI Prescription Drug Services). Additionally, Proposers must specify and document the type of Provider status (i.e., ADAP, FOHC, public, not-for-profit) they possess as well as indicating whether they are currently a 340B covered entity or are in the process of becoming a 340B covered entity.

3. Dental Care

This service includes routine dental care examinations and prophylaxis, X-rays, fillings, prosthetics, treatment of gum disease, oral surgery, and instruction on maintaining oral health.

Allocation: Based on the Miami-Dade HIV/AIDS Partnership's FY 2007 – 08 allocations for Dental Care, the maximum amount of Title I funds available in this RFP is \$1,575,046.

4. Case Management

The Title I Case Management service category has two (2) distinct components: **Case Management** and **Peer Education and Support Network (PESN)**. Proposers are required to provide both types of service.

Case management is a client-centered collaborative process that meets an individual's health and support service needs by assessing, planning, implementing, coordinating, monitoring, and evaluating available options and services. Case management addresses situational needs and promotes continuity of care for the client. Case management is predicated on client empowerment, realized through the identification of client needs and subsequent facilitation of access to appropriate services. Case management addresses both individual and family entities and their needs, and both adults and children.

The purpose and goals of case management are 1) to coordinate services across funding

streams; 2) to reduce service duplication across providers; 3) to assist the client with accessing services; 4) to use available funds and services in the most efficient and effective manner; 5) to increase the client's adherence to the care plan (i.e., medication regimen) through counseling; 6) to empower clients to remain as independent as possible; 7) to improve service and health outcomes; and 8) to control costs while ensuring that client needs are properly addressed.

Peer Education and Support Network (PESN) services include, at the option of the client, being assigned an HIV+ "Peer" (PESN, Case Aide, Peer Educator) to provide peer support, including client orientation and education about the health and social service delivery systems. The PESN Peer may assist with client intake, paperwork and applications for financial and medical eligibility, educating new clients on the process of accessing services and what to expect, as well as accompanying clients to initial appointments for medical and other services.

Allocation: Based on the Miami-Dade HIV/AIDS Partnership's FY 2007 – 08 allocations for Case Management, the maximum amount of funds available in this RFP to provide Case Management services to the General HIV/AIDS Population is \$2,988,144 and the maximum amount of funds available to serve MAI Minority Populations is \$894,290.

Providers are required to specify as part of their proposal the type of funding that is being requested, either general Title I funding or MAI funding. If both types of funding are requested, the proposal must address the proposed services separately in distinct sections. Proposals must include separate proposed service narratives, budgets, budget justifications, etc., each clearly identifying the type of funding requested. Funds are awarded separately for each type of program (General HIV/AIDS Population Case Management and MAI Case Management).

5. Substance Abuse Counseling - Residential

This service must be provided to HIV/AIDS clients in state-licensed treatment facilities, and should be limited to the pre-treatment program of recovery readiness and relapse, as well as harm reduction, conflict resolution, anger management, relapse prevention, family group and intensive counseling to reduce depression, anxiety and other related disorders, drug-free treatment and treatment for alcohol and other drug addictions.

Residential substance abuse treatment provides room and board, substance abuse treatment and counseling, including specific HIV counseling, in a secure, drug-free state-licensed residential (non-hospital) substance abuse treatment facility, and, when necessary, detoxification. Title I funds may not be used for inpatient detoxification.

Provider sites must be licensed by the Florida Department of Health as a Residential Substance Abuse Treatment facility. If food is prepared on site, the facility must have a food service license from the Miami-Dade County Health Department. All caregivers providing direct counseling services must possess *postgraduate degrees* in

the appropriate counseling-related field, or be a *certified addiction professional* (CAP).

Allocation: Based on the Miami-Dade HIV/AIDS Partnership's FY 2007 – 08 allocations for Substance Abuse Counseling – Residential Services, the maximum amount of Title I funds available in this RFP to provide Substance Abuse Counseling – Residential Services to the General HIV/AIDS Population is **\$2,351,106** and the maximum amount of funds available to serve MAI Minority Populations is **\$37,586**.

Providers are required to specify as part of their proposal the type of funding that is being requested, either general Title I funding or MAI funding. If both types of funding are requested, the proposal must address the proposed services separately in distinct sections. Proposals must include separate proposed service narratives, budgets, budget justifications, etc., each clearly identifying the type of funding requested. Funds are awarded separately for each type of program (General HIV/AIDS Population Substance Abuse Counseling – Residential Services and MAI Substance Abuse Counseling – Residential Services).

6. Substance Abuse Counseling – Outpatient

This service provides regular, ongoing substance abuse monitoring and counseling on an individual and group basis in a state-licensed outpatient setting.

Substance Abuse Counseling Level I – Professional Substance Abuse Treatment. This service includes general and intensive substance abuse therapy and counseling (individual, family, and group) provided by trained mental health or certified addiction professionals. Direct service providers must possess at least postgraduate degrees in the appropriate counseling-related field, and preferably, be a certified addiction professional (CAP).

Substance Abuse Counseling Level II – Counseling and Support Services. This service includes supportive and crisis substance abuse counseling by trained and supervised counselors, peers, and facilitators. Activities include forming or strengthening support groups, development of understanding of treatment options, holistic or alternative therapies (meditation, visualization, stress reduction, etc.), and other areas appropriate for individual and group socio-emotional support. Non-certified personnel providing this service will be supervised by professionals with Level I credentials.

Providers are required to specify as part of their proposal the level of service being proposed (Level I or Level II).

Allocation: Based on the Miami-Dade HIV/AIDS Partnership's FY 2007 – 08 allocations for Substance Abuse Counseling – Outpatient Services, the maximum amount of Title I funds available in this RFP is **\$165,271**.

7. Mental Health Therapy/Counseling

This service offers non-judgmental psychological and psychiatric treatment and counseling services to individuals with a diagnosed mental illness, conducted in a group or individual setting, and provided by a mental health professional licensed or authorized within the state to render such services.

Mental Health Therapy/Counseling Level I – Licensed Professional Mental health Counseling: This service includes intensive mental health therapy and counseling (individual, family, or group) provided solely by state-licensed mental health professionals. Direct service providers would possess postgraduate degrees in psychology, or counseling (PhD, EdD, Psy.D, MS, MA, MSW, M.Ed.) and must be licensed by the State of Florida to provide such services.

Mental Health Therapy/Counseling Level II - Licensed Professional Mental Health Counseling: This service includes intensive mental health therapy and counseling (individual, family, or group) provided solely by state-licensed mental health professionals. Direct service providers would possess Master's or postgraduate degrees in psychology, psychotherapy, or counseling (MS, MA, MSW, M.Ed.) and must be licensed by the State of Florida as a LCSW, LMHC or LMFT to provide such services.

Providers are required to specify as part of their proposal the level of service being proposed (Level I or Level II).

Allocation: Based on the Miami-Dade HIV/AIDS Partnership's FY 2007 – 08 allocations for Mental Health Therapy/Counseling, the maximum amount of funds available in this RFP is **\$232,044.**

8. Outreach Services

This service will target clients in need of assistance accessing HIV care and treatment who are 1) HIV+, never in care; 2) newly diagnosed with HIV/AIDS, not receiving medical care; 3) HIV+, formerly in care, currently not receiving medical care (lost to care); or 4) believed to be HIV+ based on documentation such as local needs assessment data, local epidemiological data, or through review of service data that shows the population(s) or geographic area(s) to be targeted are at disproportionate risk for HIV infection.

Outreach services to people already identified as HIV+ consist of activities to introduce them to the system of care and treatment available and to assist them in accessing such services. For high-risk people thought to be HIV+, a referral should be made to a testing site to determine if the client is HIV+. Once the client is determined to be HIV+, a referral must be made to a case management agency, medical provider, or if necessary, to a substance abuse treatment facility. The outreach worker may accompany the person to the point of entry into the system of care and assist in obtaining necessary documentation

to receive services. Referrals must be followed up to ensure that the client becomes enrolled in care.

Allocation: Based on the Miami-Dade HIV/AIDS Partnership's FY 2007 – 08 allocations for Outreach Services, the maximum amount of funds available in this RFP to provide Outreach Services to the General HIV/AIDS Population is **\$560,580** and the maximum amount of funds available to serve MAI Minority populations is **\$190,592**.

Providers are required to specify as part of their proposal the type of funding that is being requested, either general Title I funding or MAI funding. If both types of funding are requested, the proposal must address the proposed services separately in distinct sections. Proposals must include separate proposed service narratives, budgets, budget justifications, etc., each clearly identifying the type of funding requested. Funds are awarded separately for each type of program (General HIV/AIDS Population Outreach and MAI Outreach).

9. Food Bank

This service program is a central distribution center providing groceries, including personal hygiene products when available, for HIV+ clients. The food is distributed in cartons or bags of assorted products to Ryan White Title I eligible clients.

Providers will offer nutritional counseling by qualified staff that is supervised by a licensed dietician or nutritionist. Clients may not be enrolled in more than one Ryan White Title I food service program simultaneously, except if the client needs to access food bank service only for the purpose of obtaining personal hygiene products while enrolled in the home delivered meal program. Clients must be documented as ineligible for Food Stamps or other entitlement programs. Clients must also have income at or below 150% of Federal Poverty Level.

Allocation: Based on the Miami-Dade HIV/AIDS Partnership's FY 2007 – 08 allocations for Food Bank, the maximum amount of Title I funds available in this RFP is **\$314,679**.

10. Health Insurance Services

There are three types of assistance under this service category: **AIDS Insurance Continuation Program (AICP), Insurance Deductibles, and Prescription Drug Co-Payments.**

AIDS Insurance Continuation Program

This program component provides assistance to clients who already have private health insurance but are not financially able to pay the insurance premiums. This service does not provide new health insurance policies to eligible clients; it allows them to continue with their current insurance carrier. This service does not include coverage of disability

or life insurance payments and does not provide assistance with deductibles and/or co-payments. The maximum amount of assistance a client may receive each month is \$650. Title I will be able to assist the client in making back payments of premiums as long as the insurance policy has not been terminated. Assistance may also be provided to facilitate conversion of group coverage (i.e., COBRA) to an individual insurance policy. Title I may only be utilized to pay for a dependent's health insurance premium if the dependent meets the eligibility requirements specified below.

Insurance Deductibles

This program component pays for insurance deductibles for clients with private health insurance coverage who are unable to pay for this cost, thereby minimizing the client's potential reliance on the Title I Program (outpatient medical care and prescription drugs).

Prescription Drugs Co-Insurance and Co-Payments

This program component is available to privately insured clients who are required to pay a fee for their medications. The pharmaceutical provider will bill the insurance carrier for a portion of the cost of the prescription plus the dispensing fee and Title I will cover the remaining portion of the cost for clients who meet the eligibility criteria. Assistance for both co-insurance and co-payments is restricted to those medications on the currently approved Ryan White Title I Prescription Drugs Formulary.

Providers are required to specify as part of their proposal the level of service being proposed (AICP, Insurance Deductibles, and/or Prescription Drugs Co-Insurance and Co-Payments).

Allocation: Based on the Miami-Dade HIV/AIDS Partnership's FY 2007 - 08 combined allocation for Health Insurance Services, the maximum amount of Title I funds available for Health Insurance services in this RFP is **\$325,000**.

11. Psychosocial Support Services

This service provides support and counseling activities including HIV support groups, pastoral care, and caregiver support that are not provided by licensed mental health professionals.

Psychosocial Support Level III – This service includes general mental health therapy and counseling (individual, family, or group) provided by a Bachelor's degree level provider in an appropriate counseling-related field. Non-licensed personnel providing this service will be supervised by licensed professionals or professionals exempt from licensing under F.S. 491.014

Psychosocial Support Level IV – This service includes supportive counseling by trained and supervised peers. Activities include forming and strengthening support groups and

other areas appropriate for individuals and group socio-emotional support. Non-licensed personnel providing this service will be supervised by licensed professionals or professionals exempt from licensing under F.S. 491.014

Pastoral Care and Support Services – This service assists HIV+ persons, as well as members of their immediate family and of their household, in the clarification/identification of their own resources/tasks/priorities and in the development and/or enhancement of their resources through individual or family pastoral care. Pastoral Care counselors must 1) hold a masters or doctoral degree in theology, philosophy, social work, psychology, or a related field from an accredited institution; and/or 2) have completed at least four units (1,600 hours or one full year) in clinical pastoral education (CPE) in an institution accredited by one of the following professional associations: The Association of Clinical Pastoral Education, National Association of Catholic Chaplains, National Association of Jewish Chaplains, American Institute of Islamic Studies, or Canadian Association of Pastoral Education. At least one CPE unit must be in HIV or a life-threatening disease.

Providers are required to specify as part of their proposal the level of service being proposed (Level III, Level IV, or Pastoral Care Support Services).

Allocation: Based on the Miami-Dade HIV/AIDS Partnership's FY 2007 – 08 allocation for Psychosocial Support Services, the maximum amount of Title I funds available in this RFP is **\$291,331.**

12. Home Delivered Meals

This service includes the provision of both frozen and/or hot meals that meet the American Dietary Association's minimum daily requirements (MDR) or the MDR for a meal. Providers must demonstrate their capacity to provide ethnic foods and foods suited to client's special dietary needs.

Providers will offer nutritional counseling to all food service clients through qualified staff supervised by a licensed dietician or nutritionist. Clients may not be enrolled in more than one Ryan White Title I food service program simultaneously, except if the client needs to access food bank service only for the purpose of obtaining personal hygiene products while enrolled in the home delivered meal program. Clients must be documented as ineligible for Food Stamps or other food benefit programs. For this service, clients must also be homebound, as defined by Medicaid Project AIDS Care (PAC Waiver) and as certified by a physician. PAC Waiver defines a homebound individual as one who is "confined to his or her home for any period of time and is unable to leave the residence without assistance from another person. The homebound person must have no other means of obtaining meals." In addition, clients accessing this service must be functionally impaired. A functional impairment means difficulty performing one or more activities of daily living (i.e., bathing, dressing, walking, eating), and may not be capable of preparing meals. No other person in the client's household

may be able to prepare meals, or the person who usually prepares meals is temporarily absent or unable to manage meal preparation.

Allocation: Based on the Miami-Dade HIV/AIDS Partnership's FY 2007 – 08 allocation for Home Delivered Meals, the maximum amount of Title I funds available this RFP is \$205,365.

13. Legal Assistance

This service provides legal assistance to individuals living with HIV/AIDS who would not otherwise have access to these services. Services include assistance with estate planning, permanency planning, guardianship, and access to benefits, health care surrogates, and other civil legal services, including issues faced by immigrants. Funds may be used to support and complement pro bono activities and must be provided under the supervision of an attorney licensed by the Florida Bar Association. Clients eligible for this service must have an income that falls at or below 200% of the Federal Poverty Level.

Allocation: Based on the Miami-Dade HIV/AIDS Partnership's FY 2007 – 08 allocation for Legal Assistance, the maximum amount of Title I funds available in this RFP is \$306,702.

14. Home Health Care

This service encompasses a full range of therapeutic, nursing, supportive, and personal care services in the home provided by licensed home health agencies and are available 24 hours, seven days a week. Home health care services include the following: skilled nursing care; infusion care and therapy; intensive home health aide/homemaker; physical, occupational, and speech therapies; respiratory therapy; respite care; and, consumable medical supplies. Providers of home health care services will also be allowed to purchase consumable medical supplies and durable medical equipment required in order to provide home health care services to HIV+ clients as prescribed by a physician.

Allocation: Based on the Miami-Dade HIV/AIDS Partnership's FY 2007 – 08 allocation for Home Health Care Services, the maximum amount of Title I funds available in this RFP is \$95,000.

15. Day Care Services

This service provides Intensive Day Care Services in state-licensed facilities relieving caregivers of medically needy HIV+ children on a temporary or continuing basis. Intensive day care provides comprehensive and developmentally appropriate childcare focusing on medically involved children (from birth up to and including age five (5)) who are HIV+ and symptomatic and/or have AIDS. The Intensive Day Care Service include educational and social support to children requiring medical care on a day-to-day basis. Day care service staff, at a minimum, must include a Registered Nurse and

certified staff to provide medical care on an as needed basis (administer medications, speech therapy, monitor feeding tubes, etc.) Providers must screen clients for all other day care programs including pre-Kindergarten and Head Start.

Allocation: Based on the Miami-Dade HIV/AIDS Partnership's FY 2007 – 08 allocation for Day Care Services, the maximum amount of Title I funds available in this RFP is \$50,000.

16. Transportation Services (Vans)

This service provides free transportation to and from HIV service programs, Miami-Dade HIV/AIDS Partnership functions, and/or home for HIV+ clients and their qualified dependents and/or caregivers in cars or vans operated directly by funded service providers. Clients must have incomes at or below 150% of the Federal Poverty Level. Additionally, funding for this service is restricted to the South Miami-Dade County area (designated as South of SW 88th Street, Kendall Drive). Providers of this service must demonstrate coordination with Miami-Dade transportation agencies and services, Medicaid Special Transportation and Special Transportation Services (STS), and other existing transportation programs to avoid duplication of services.

Allocation: Based on the Miami-Dade HIV/AIDS Partnership's FY 2007 – 08 allocation for Transportation Services (Vans), the maximum amount of Title I funds available in this RFP is \$6,000.

17. Transportation Vouchers

This service provides Metro transportation passes or tokens to eligible HIV+ clients attending medical and/or social service appointments and their qualified dependents and caregivers. This service may provide monthly and daily passes. Providers of this service must demonstrate coordination with Miami-Dade transportation agencies and services, Medicaid Special Transportation, and Special Transportation Services (STS) and other existing transportation programs to avoid duplication of services. In addition, providers of this service MUST apply and show Miami-Dade County's Ryan White Title I Program proof of application to the Miami-Dade Transit Transportation Disadvantaged Program in order to obtain assistance for clients eligible under this program. Clients who access these vouchers must have incomes at or below 150% of the Federal Poverty Level.

Allocation: Based on the Miami-Dade HIV/AIDS Partnership's FY 2007 – 08 allocation for Transportation Vouchers, the maximum amount of Title I funds available in this RFP is \$110,000.

SECTION 4.0 PROPOSAL FORMAT**4.1 INSTRUCTIONS TO PROPOSERS**

Proposals **MUST** address all of the topics in this section in the sequence outlined in the Proposal Submission Checklist (Attachment 43). Proposals **MUST** contain each of the documents listed below, fully completed, signed, and notarized where required. Proposals submitted which do not include the following items may be deemed non-responsive and may not be considered for contract award. Responses are to be concise and consist only of the answers to the questions posed. Extraneous material or information should not be submitted. Do not exceed the specified page limitations. All materials are to be submitted on 8 1/2" X 11" paper, neatly typed on one side only, with standard margins and spacing. An unbound, one-sided original and fifteen (15) unbound copies (a total of 16) of the complete proposal must be received by Wednesday, August 23, 2006, at 2:00 P.M. (E.S.T.). No late proposal will be accepted.

4.2 CONTENTS OF PROPOSAL

To be scored and rated as being fully adequate, each proposal must include the following information:

A. Proposal Title Page

Include on the Proposal Title Page (Attachment 1) the services to be provided, the amount of funds being requested to provide these services, and the name/contact information for the contract coordinator or program liaison. The original copy of this form must be signed by an officer of the Proposer(s) who is legally authorized to enter into a contractual relationship in the name of the Proposer(s). The Proposer(s) must affix the proposing organization's corporate seal to the original copy of this document, and in the absence of a corporate seal this form must be notarized by a Notary Public. The original copy of the proposal must be clearly marked as such on the Proposal Title Page.

B. Table of Contents

The Table of Contents should outline in sequential order the major areas of the proposal. All pages of the proposal including the attachments must be clearly and consecutively numbered and keyed to the Table of Contents. Appendices can be numbered differently/separately from the narrative (e.g., A-1), however, each page should be numbered sequentially (e.g., A-1, A-2, A-3, etc.).

C. Minimum Qualification Requirements

Proposers shall provide documentation that demonstrates their ability to satisfy all of the requirements specified in this RFP under Section 3.0, Scope of Services.

Proposers who do not meet the requirements or who fail to provide supporting documentation will not be considered for an award. If a prescribed format listed below or required documentation for the response to minimum qualification requirements identified in Section 3.0 (e.g., proof of licensure as stated in Section 4.2, Items F11 and F12) is listed below, Proposers must submit such documentation.

D. Abstract for the Proposed Services (Limit 1 page per proposed service)

The abstract(s) must include the *full, legal* name of the proposing organization; corporate/tax status of proposing organization (not-for-profit); a brief description of identified service needs/demands and target geographic area/population; the number of clients to be served; the number of units of service to be provided; a brief description of the proposed program and service approach; and a total budget request.

E. Service Experience (Complete this section once in your agency's proposal and do not exceed 8 pages, not including forms and/or appendices)

1. Describe your organization's general history, including the date when the organization first started providing services. Do not limit your response to past experience in providing Ryan White Title I services. **Organizations proposing to provide Minority AIDS Initiative (MAI) services must document experience in serving the communities of color targeted in their proposal.**

Identify the corporate/tax status of your organization (public, not-for-profit). Include as **Appendix 1** documentation of corporate/tax status in the name of the proposing organization and subcontractors, if applicable.

List the agency's achievements. State the full range of services that your organization currently provides. If your organization is part of a multi-program organization, provide a description of the parent organization and its involvement in the on-going operation of your service programs.

2. Describe the staff's experience providing services, including the length of time that key staff has provided services, especially services to persons living with HIV/AIDS. Describe the staff's minimum qualifications and accreditations that document the ability of staff to manage and provide the services requested in this RFP.
3. Indicate whether or not your organization is a Medicaid, Medicaid Waiver, and/or Medicare provider. Indicate the number and percentage of clients served by your organization who have been identified as Medicaid eligible. Indicate whether or not your organization is classified as a Federally Qualified Health Center (FQHC).

4. Describe your organization's capacity to respond to special client groups, such as persons with disabilities and special needs. Describe your organization's cultural and linguistic capabilities. **Organizations proposing to provide Minority AIDS Initiative (MAI) services must document the ability to provide services to targeted community(ies) of color in a manner that is culturally and linguistically appropriate.**
5. Describe your organization's client orientation processes, including the familiarization of clients to services offered by the agency and those available in the community at large.
6. Describe your organization's internal client screening processes to determine medical, financial, and Miami-Dade residency eligibility for Title I services, and for services offered under other benefit programs. Describe how your organization will assure that Title I funds will be used as payor of last resort.
7. Describe your organization's policies and procedures for conducting internal and external referrals; explain all phases of the referral process; include, as Appendix 2, a copy of all referral and linkage agreements, letters of commitment, or documentation of working relationships with any organization providing HIV/AIDS services. **Organizations proposing to provide Minority AIDS Initiative (MAI) services must document linkages to targeted communities of color (not just to service providers).**
8. Describe your organization's policies regarding the development and update of client charts, including updates to case notes, review of client charts by direct service and supervisory staff, frequency of updates to eligibility documentation; explain how your agency will provide receipts to clients for each service rendered.
9. Describe your system for collecting, maintaining, and reporting client level and service delivery data, as well as agency/administrative information. Describe your organization's ability to utilize the Service Delivery Information System (SDIS) for assigning a unique identifier to each client to ensure accurate reporting of unduplicated client case load. Describe how your organization will ensure compliance with all Miami-Dade County and HRSA contractual reporting requirements.
10. Submit, as Appendix 3, a complete copy of your organization's most current certified audit verifying that the agency is on a sound financial footing and able to implement a funded service on a reimbursement basis. Financial statements do not represent a complete audit. Therefore, if a certified audit is not available, financial statements and detailed plans to comply with contractual audit requirements must be submitted as part of the proposal narrative in response to this question.

11. Explain your organization's system for safeguarding the confidentiality of clients, including the organization's definition of confidentiality, policies regarding staff's compliance with confidentiality regulations, the organization's efforts to conduct regular training on confidentiality issues, the protection of client records, exchange and release of information, and the protection of the client's privacy. Furthermore, describe your organization's efforts to comply with the rules and regulations of the Health Insurance Portability and Accountability Act of 1996 (HIPAA), if applicable.
12. Describe the process used to monitor and control the quality of care provided by staff. Describe on-going staff training activities including your organization's training curriculum, if applicable. If a training curriculum is available, include a copy as an additional appendix.
13. Explain your organization's policies regarding the provision of compassionate, courteous, and non-judgmental care to people living with HIV/AIDS, including a description of internal measures used to evaluate and maintain customer service practices.
14. Describe your organization's current grievance procedures, or those proposed to be established for these purposes. Indicate how your organization informs clients and other service providers of its grievance policies, and include, as **Appendix 4**, a copy of these policies. Describe how many client grievances your organization received in the past twelve month period and how many of these were successfully resolved.
15. Explain how your organization solicits input from people living with HIV/AIDS in its decision-making processes; indicate whether or not the organization has an established Client Advisory Board.
16. Indicate which Ryan White Title I System-wide Standards of Care (**Attachment 35**) your agency is in full compliance with at the time of proposal submission. Identify your agency's proposed timeline for progress towards meeting other System-wide Standards of Care that it does not currently meet.
17. Include as part of your proposal a statement that ensures that your organization serves all clients without regard to race, color, religious background, ancestry, sex, age, national origin, medical, or mental condition.
18. Enclose, as **Appendix 5**, a current listing of the Board of Directors, Officers of the Organization, and Advisory Council Members; provide an ethnic/racial breakdown of Board members and of the organization's staff (paid or volunteer). **IMPORTANT: This information must be submitted by all proposing organizations, however, it is particularly relevant to proposers**

of Minority AIDS Initiative (MAI) services since it will be used by the Evaluation/Selection Committee appointed by the County Manager as a criterion when determining if a proposing organization may be given special consideration to receive MAI funds.

19. Describe any prior or pending litigation, either civil or criminal, involving a governmental agency or other body which may affect the performance of the services to be rendered herein, in which the proposing organization, any of its employees or subcontractors (subconsultants) is or has been involved within the last three (3) years.

F. Proposed Service(s) (Complete once for each proposed service and do not exceed 8 pages, not including forms and/or appendices)

Carefully review the service definition(s) included in Section 3.0, **SCOPE OF SERVICES** and in the **Ryan White Title I Service Delivery Policies Fiscal Year 2007 – 08 (Year 17)**. In your response to this section, describe your proposed service delivery addressing all requirements and restrictions listed in the definition of the service you propose to provide.

1. Describe your organization's past experience in providing the proposed service(s), including a description of funding received (i.e., other grants, Medicaid, etc.), and the number of clients served and over what time period. **Organizations proposing to provide Minority AIDS Initiative (MAI) services must document experience in serving the communities of color targeted in their proposal.**
2. If your agency currently provides this service indicate the number of clients served by gender and ethnicity; number and level of staff providing the proposed service(s), and the source(s), amount(s), time period(s) of existing HIV/AIDS related funding; complete a Funding Source Summary Form (Attachment 40) and include as Appendix 6.
3. Describe the level of need/demand for each proposed service as experienced by your organization, and the specific client group(s), by gender and race/ethnicity, in need of these services; specify the proposed program(s) target geographic area and populations to be served.
4. Describe any service expansion(s) or modification(s) that you are proposing to provide in order to meet an identified need for the service(s). Proposed programs will only be funded when gaps in service or available funding are clearly identified, adequately documented, and a strong justification is made for using Ryan White Title I as opposed to other funding sources (i.e., target population which is not eligible for Medicaid or is not covered by private insurance).

5. Provide a description of your proposed service approach and the rationale underlying the approach to be taken in providing the service; include an explanation of how your organization is planning to integrate Title I services with other services, including services your agency provides and those available elsewhere in the community. In addition, provide a description of how your organization will provide culturally sensitive services to specific racial/ethnic groups, and how it will monitor client's adherence to treatment and how adherence problems will be identified and resolved.
6. Describe your organization's specific policies regarding quality of care in the provision of the proposed service, and describe all processes established to ensure quality of services to HIV/AIDS clients.
7. Describe your organization's intake process; explain how your agency will deal with "Walk-ins," especially those in crisis; include an explanation of how your organization monitors the availability of slots for specific services.
8. Provide a schedule of hours of operation for each proposed service, a list of sites where services will be available, and estimates of the number of clients to be served, and the number of units of service to be provided. **Organizations proposing to provide Minority AIDS Initiative (MAI) services must document that the proposed service sites are located in or near where the community(ies) of color targeted in their proposal reside or congregate.**
9. If your organization is proposing to provide prescription drug services:
 - a) Indicate if your organization is currently eligible to purchase prescription drugs at Public Health Service (PHS) pricing under the federal 340B program. Specify the number of years the organization has participated in the 340B program and, if applicable, anticipated date for renewal/expiration of eligibility.
 - b) Describe how the organization will maintain and track separately the inventory of drugs purchased with Title I funds (Title I inventory must be physically separated from drugs purchased with non-Title I dollars).
 - c) Describe the organization's policies and procedures for purchasing, receiving, storing, and distributing prescription drugs.
 - d) Describe the organization's policies and procedures for maintaining and disposing of prescription drug records.
 - e) Provide a detailed explanation of how the organization calculated the proposed discount rate corresponding to AWP reimbursement and the proposed flat fee corresponding to PHS reimbursement.

10. Indicate if staff required to provide the service(s) is currently on board or if recruitment will be necessary. Identify a staff person to serve as the Contract Coordinator or liaison; said individual will monitor the contract provisions and must be available to meet with the County's staff to review activities on an "as needed" basis.

NOTE: After proposal submission, but prior to the award of any contract issued as a result of this RFP, the Proposer has a continuing obligation to advise the County of any changes, intended or otherwise, to the key personnel identified in its proposal for each service category.

11. Describe and enclose as Appendix 7 any licensure requirements and or accreditations that have been met by your organization and/or key members of your proposed project staff.
12. Enclose as Appendix 8 resumes, job descriptions, and copies of required licenses for the person who will be the principal liaison to the County and key professional staff who will be providing direct services to clients. (Approximately one page per person).

G. Line Item Budget and Price Forms

1. Due to Federal requirements, the Proposer(s) must submit a categorical line item budget (Attachment 13) and narrative justification (Attachment 14) for each direct and indirect cost associated with the proposed service, using the object class categories listed below. A total dollar amount for indirect charges without a detailed breakdown on the budget form will not be accepted. Failure to submit the categorical budget with your proposal will **DISQUALIFY** your organization for consideration by the Evaluation/Selection Committee for award of funds.

Object Class Categories - Personnel (salaries and fringe benefits), contractual expenses, supplies, travel (local travel only), equipment, other direct costs, and indirect administrative charges. The line item budget should include all program related expenses for which funds are being requested. A narrative justification must be included as part of this section, specifying how each line item is directly related and/or necessary to the provision of direct client care and services. The justification must also include a detailed description of how unit costs and/or dispensing charges were calculated. **Indirect/Administrative costs are capped at 10%.** Proposers are required to follow the budget limitations and reimbursement caps established by OSBM as identified in the Ryan White Title I Service Delivery Policies Fiscal Year 2007 – 08 (Year 17).

2. Complete the Price Form(s) for the proposed service(s). Instructions for

completing the Price Forms are provided on the reverse side of each form (Attachments 18 – 34). Proposer(s) must provide all of the required information on the forms and must include the signature of an official who is authorized to enter into a contractual agreement on behalf of the organization. The proposer(s) must affix their corporate seal to this document. In the absence of a corporate seal this document may be notarized by a notary public. The original copy of the Price Form must be clearly marked as such.

3. Describe, in detail, your organization's history of and ability to leverage and maximize other funding streams (i.e., Medicaid, other federal grants, private foundations, fundraising).

Proposers are reminded that if the Office of Strategic Business Management, the department designated by the County Manager to administer the grant, determines, based on average monthly reimbursements, that service providers are not spending at a rate that indicates they will fully expend their allocation(s) within the contract period, the dollar amount awarded to the service provider(s) for these categories of service will be reduced accordingly. The County has, in the past, reduced allocations of service providers whose monthly projections indicated they would not expend their allocations. The County will continue with this practice in the future to ensure that the level of Ryan White Title I funding received by Miami-Dade County is not reduced in the coming years due to the inability to expend previously allocated grant funds.

H. Required Affidavits/Acknowledgments

*Proposers **MUST** complete, sign as required, and submit the following documents as part of this RFP:*

1. All Proposers must acknowledge receipt of all the addenda issued in relation to this RFP. Acknowledgment of Addenda must be included with your proposal (Attachment 2) as Section H.1 of the proposal. Proposers should telephone the contact person for this RFP prior to submission of their proposal to verify that they have received all addenda issued.
2. All Proposers are advised that in accordance with Section 2-11.1 (s) of the Code of Miami-Dade County, the Lobbyists Registration for Oral Presentation Affidavit must be completed, notarized and included with your proposal submission. Lobbyist specifically includes the principal, as well as any agent, officer or employee of a principal, regardless of whether such lobbying activities fall within the normal scope of employment of such agent, officer or employee (Attachment 3) as Section H.2 of the proposal.
3. All Proposers must complete and include the Miami-Dade County Affidavit – Taxes, Fees, and Parking Tickets Have Been Paid (Attachment 9) as Section H.3 of the proposal. This Affidavit, which attests that all delinquent and

- currently due fees, taxes, and parking tickets owed to the Miami-Dade County by the Proposer(s) have been paid, must be signed by an authorized agent of the proposing organization and notarized.
4. All Proposers must complete and include the Disability Nondiscrimination Affidavit (Attachment 12) as Section H.4 of the proposal. This Affidavit, which attests that the organization is in compliance with ADA standards, should be signed by an authorized agent and notarized.
 5. All Proposers must complete and include as Section H.5.a of the proposal, the Proposer's Disclosure of Subcontractors and Suppliers Form (Attachment 5). This form must be submitted to identify all first tier subcontractors or subconsultants which will perform any part of the contract work and all suppliers which will directly supply materials to the selected Proposer for the contract work. In addition, Proposers must complete and include, as Section H.5.b of the proposal, the Proposer's Disclosure of Fair Subcontracting Policies (Attachment 6). This form must be submitted to provide a statement of the Proposer's subcontracting policies and procedures. Both forms must be signed by an authorized agent of the proposing organization. **IMPORTANT: Failure to complete these forms in their entirety or indicating "Not Applicable (N/A)" on sections of the forms will deem the proposal non-responsive.**
 6. Proposing organizations with annual gross revenues in excess of \$5 million must submit as Section H.6.a of their proposal a written Affirmative Action Plan and Procurement Policy Affidavit (Attachment 7) which must remain on file with the Miami-Dade County's Department of Business Development. Proposing organizations whose Board of Directors is representative of the population make-up of the nation are exempt from this requirement and may claim exemption by submitting as Section H.6.b of their proposal the Affirmative Action Plan Exemption Affidavit (Attachment 8).
 7. All Proposers must complete and include the Code of Business Ethics Affidavit (Attachment 10) as Section H.7 of the proposal. This Affidavit, which attests that the organization is fully compliant with the requirements of Section 2-8.1(1) of the Code of Miami-Dade County as amended, and has adopted the County's Code of Business Ethics, should be signed by an authorized agent and notarized.
 8. Proposers must complete, if applicable, and submit prior to entering into a contract with or receiving funding from Miami-Dade County the Criminal Record Affidavit. This form, which is available from the Department of Procurement Management/Office of Vendor Assistance at (305) 375-5773, must be submitted if the Proposer has been convicted of a felony during the past ten years.

9. Proposers must complete, if applicable, and submit prior to entering into a contract with or receiving funding from Miami-Dade County the Domestic Violence Leave Affidavit (Attachment 11). This form must be submitted if the Proposer has, in the regular course of business, fifty (50) or more employees working in Miami-Dade County for each working day during each of the twenty (20) or more calendar work weeks in the current or preceding calendar year.

4.3 QUALIFICATIONS/STATEMENT OF QUALIFICATIONS

The successful Proposers **MUST** have sufficient financial resources to meet expenses incurred during the period between the purchase of services and payment by the County. It is anticipated that the County will pay for services rendered within four (4) to six (6) weeks of the receipt of invoices, deemed correct and acceptable by the County.

4.4 PROPOSAL SUBMISSION REQUIREMENTS

All material is to be submitted on 8 1/2" x 11" paper, typed on one side only with standard margins, line and character spacing (12 characters per inch). One unbound original and fifteen (15) unbound copies (a total of 16) is required. Appendices are required to be listed in the Table of Contents. The original Proposal Title Page (Attachment 1) and the original Price Forms (Attachments 18 – 34) must have an authorized signature and must be notarized. The original copy of the proposal **MUST** be clearly marked as such on the Proposal Title Page, containing original signatures, original corporate seal and/or Notary Public stamp. Additional copies of the proposal do not need to bear original signatures nor original stamps. Proposers shall include their complete return address on the outer envelope wrapper in response to this RFP. The outer envelope or wrapper for the **original and copies** of the proposal should be addressed as follows (see below):

Proposer's Name
Proposer's Address
Proposer's Telephone Number

Miami-Dade County
Clerk of the Board of County Commissioners
Stephen P. Clark Center
111 N.W. 1st Street, 17th Floor, Suite 202
Miami, Florida 33128

RFP No. 0307, Health and Support Services for Persons Living with
HIV/AIDS - Ryan White Title I Program
Proposal Due Date – 08/23/06

SECTION 5.0 EVALUATION/SELECTION PROCESS

The evaluation of proposals and selection of award recommendations will be made during the evaluation/selection process. Proposals will be evaluated by an Evaluation/Selection Committee appointed by the County Manager comprised of appropriate County personnel from multiple departments and representatives of the community, as deemed necessary, with the appropriate experience and/or knowledge while striving to ensure that the committee is balanced with regard to both race/ethnicity and gender.

The method of contract award will be based on a qualitative appraisal rating and ranking of responsiveness to the RFP proposal format as outlined in Section 4.0. and based on point totals for each evaluation criteria and not on a percentage factor. The Evaluation/Selection Committee will evaluate and rank responsive proposals on the evaluation criteria listed below. The criteria are itemized with their respective weights for a maximum of 100 points. A Proposer may receive the maximum points or a portion of this score depending on the merit of its proposal, as determined by the Evaluation/Selection Committee.

After the qualitative appraisal, rating, and ranking evaluation, the committee may choose to conduct oral presentations from those Proposers ranked the highest. Upon completion of the oral presentation(s), if conducted, the Committee will re-evaluate, re-rate, and re-rank the proposals remaining in consideration based upon the written documents combined with the oral presentation.

Following the qualitative appraisal and oral presentations (if conducted), the Evaluation/Selection Committee will then report its findings as to relative merit and recommendation for contract award to the County Manager for his review and concurrence.

The County Manager will present his recommendation to the Board of County Commissioners, who, as the duly elected representatives of the residents of Miami-Dade County, have the sole authority to award contracts on behalf of the County.

5.1 EVALUATION CRITERIA

A. Organizational Longevity, Experience, Minority Representation on the Board of Directors or Among Professional/Volunteer Staff (15 points):

- Period of time that the proposing organization has been providing services [Up to 2 points].
- Period of time that key supervisory and direct service staff have been providing services to people living with HIV/AIDS [Up to 8 points].
- Representation of minority racial/ethnic groups in the organization's Board of Directors or among its professional/volunteer staff [Up to 5 points].

B. Administration and Cost (30 points):

- Line-item budget is complete, well documented, and yields reasonable unit-cost calculations [Up to 5 points].
- Proposing organization's unit costs, relative to those proposed by other programs providing similar services [10 points]. **NOTE:** Proposers will be given points proportionately in relation to the lowest unit cost. This point total will be calculated by dividing the lowest unit cost by the unit cost of the proposal being evaluated with the result being multiplied by the maximum weight for this criteria (10 points) to arrive at a cost score.

Example:	$\frac{\text{Lowest Unit Cost Proposed}}{\text{Proposed Unit Cost}}$	\times	Total Points =	Cost
			for Cost	Score

The application of the above formula will result in a uniform assignment of points relative to the criterion of cost [Up to 10 points].

The pricing formula is used as part of the evaluation process to determine the highest ranked proposer in this criteria. The County reserves the right to negotiate the final terms, conditions, and pricing of the contract as may be in the best interest of the County.

- Proposing organization's financial capability to undertake the proposed scope of work on a reimbursement basis [Up to 5 points].
- Proposing organization's plan for using Ryan White Title I dollars as the funding source of last resort; the organization has demonstrated the ability to use sliding fee scales, co-payments, leverage and maximize other funding streams and/or private insurance [Up to 5 points].
- Proposing organization's ability to meet Title I programmatic, fiscal, and administrative reporting requirements [Up to 5 points].

C. Quality of Service Delivery (20 points):

- Proposing organization's ability to identify and address a significant gap in existing funded services for people living with HIV/AIDS, including service gaps among particular racial/ethnic groups [Up to 5 points].
- Proposed services are well planned and detailed and address the requirements included in Section 3.0, Scope of Services [Up to 5 points].
- Proposing organization's documentation of working referral relations and

linkage agreements with Ryan White Title I and non-Ryan White Title I providers is described [Up to 5 points].

- Proposing organization's mechanism for reviewing the quality of client care, to identify deficiencies, and to ensure remedy of service delivery problems; proposing organization's policy regarding compassionate, courteous, culturally sensitive, and non-judgmental service toward their clients living with HIV/AIDS; proposing organization's plan for the integration of services funded under Ryan White Title I with other non-Ryan White services offered within the agency or externally [Up to 5 points].

D. Barriers to Utilization (30 points):

- Provision of services with regards to high need areas, traditionally underserved areas, or high need populations (i.e., specific racial/ethnic groups) [Up to 10 points].
- Proposing organization's ability to ensure that persons living with HIV/AIDS play a role in delivering services or making decisions within the organization [Up to 5 points].
- Proposing organization's provisions for clients who are disabled or who have special needs [Up to 5 points].
- Proposing organization's cultural sensitivity as demonstrated by its willingness and ability to accommodate clients of different languages, racial and ethnic groups, and other special populations [Up to 5 points].
- Proposing organization's grievance process [Up to 5 points].

E. Compliance with RFP (5 points):

- Proposal's inclusion of all required elements without significant omissions or inconsistencies, following the required format, and its conciseness [Up to 5 points].

5.3 CONTRACT AWARD

All Proposers will be notified in writing when the County Manager or designee makes an award recommendation. The Contract award(s), if any, shall be made to the Proposer(s) whose proposal(s) shall be deemed by the Board of County Commissioners to be in the best interest of the County. The Board of County Commissioners' decision of whether to make the award(s) and which proposal(s) are in the best interest of the County shall be final.

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This form is to be used for all services including those that are reimbursed based on either a unit cost or multiplier.

Instructions for completing the Line Item Budget Form are provided on the reverse side of this document.

Ryan White		Other Funding					Total Cost For Budget Period	Percent Charged to Title I
Title I Service Costs	Title I Indirect/Admin. Costs*	Other Title I Funds	All Other Federal Funds	City and/or State	General Oper./Private			
1. Position								
Fringes								
2. Position								
Fringes								
3. Position								
Fringes								
4. Position								
Fringes								
5. Position								
Fringes								
6. Position								
Fringes								
7. Position								
Fringes								
Travel								
Supplies								
Equipment								
Contractual:								
Other Direct Costs:								
Other Direct Costs:								
Other Direct Costs:								
Other Direct Costs:								
Other Indirect Costs:								
Other Indirect Costs:								
TOTAL								
TOTAL AMOUNT REQUESTED								
*Total not to exceed 10% of Total Amount Requested								

RFP No. 0307
ATTACHMENT 13
(continued)

**Instructions for Completing
Line Item Budget Form**

1. In the box titled "Organization," please indicate the full legal name of the proposing organization.
2. In the box titled "Service Category," please indicate the name of the service category that the proposing organization will provide if awarded funding under the Ryan White Title I Program.
3. In the box titled "Budget Period," please indicate the time period as **March 1, 2007 through February 29, 2008**, the time during which the proposing organization will allocate if awarded funds to provide the service identified above.
4. In the spaces provided under the column labeled "Object Class Categories," first, list all direct service personnel and fringe benefits for each proposed position. Next, list all indirect/administrative personnel and their fringe benefits. For all staff listed, indicate their position title, first initial, last name, and the percent at which the fringe benefits are calculated. Then, in the following order, list travel for direct service personnel, direct service supplies, direct service equipment, contractual direct services, and any other direct costs (please see below for more information regarding allowable direct costs).
5. In the column labeled "Title I Service Costs," please indicate, for this service category only, the amount for each line item to be funded by Title I as a direct cost. In the next column labeled "Title I Indirect/Administrative Costs" identify the amount allocated, for this service category only, for each specific line item listed as an indirect/administrative cost, if applicable.
6. In the column labeled "Title I Indirect/Administrative Costs," please indicate the amount of indirect/overhead/administrative costs covered by Title I for each applicable line item (i.e. personnel, travel, supplies, equipment, or other indirect line item, etc.). The total amount of these costs under the column labeled "Title I Indirect/Administrative Costs" cannot exceed 10% of the total request. For example, if the total amount of funds being requested is \$10,000, then the total for the "Title I Indirect/Administrative Costs" column may not exceed \$1,000 (10% of the \$10,000 being requested). Due to Federal requirements, a detailed breakdown of individual indirect/administrative expenses is required; except for agencies with a Federally approved indirect cost rate, in which case a copy of the "Rate Agreement" must be included as part of the proposer's submission.
7. In the columns to the right labeled "Other Funding", indicate all other funding sources which are expected to support the proposed line items (i.e., Other Title I, Title II, HOPWA, local government funding, state funding, other federal funding, fees, contributions, general operating funds, etc.), where appropriate. Where the time periods overlap, if any line item under any other Title I funded service category (i.e., same line item on other Title I proposed budgets) is also listed under this budget, your proposing organization must include this contribution as "Other Title I" funds. For all other funding, be sure to calculate (prorate) the contribution from other proposed sources based on the time period indicated on this budget.
8. In the last two columns, for this service category only, indicate the total cost to your proposing organization for each line item for the budget period indicated and the percentage of each line item to be charged to Ryan White Title I (i.e., for each direct service line item, the percent charged to Title I, for this service category only, equals the amount listed as a "Title I Service Cost" divided by the amount identified as the "Total Cost for Budget Period". Similarly, for indirect line items, the percent charged to Title I, for this service category only, equals the amount listed as a "Title I Indirect/Administrative Costs" divided by the amount identified as the "Total Cost for Budget Period." If a line item has both a Title I direct and indirect allocation, add these amounts together then divide by the total cost to your proposing organization to get the total percent charged to Title I under this budget.)
9. Indicate the Total for each column in the space provided.
10. Indicate the Total Amount Requested from Title I under this service category in the space provided (i.e., the sum of "Title I Service Costs" and "Title I Indirect/Administrative Costs").

NOTE: FOR A LISTING OF ALLOWABLE DIRECT COSTS BY SERVICE CATEGORY, PLEASE SEE THE BUDGET JUSTIFICATION INSTRUCTIONS.

RYAN WHITE TITLE I PROGRAM INSTRUCTIONS FOR PREPARING A BUDGET JUSTIFICATION

A budget justification must be submitted along with each categorical (line item) budget explaining the association of each expenditure to a Title I service program in relation to the service provider's total expenditures. Budget justifications must be specific, concise, and reflective of the budget period. The following guidelines must be followed when preparing a budget justification:

- **IMPORTANT: Please be advised, due to Federal requirements all costs (direct and indirect) must be presented on the budget form using the standard line item categories of personnel, fringe benefits, supplies, equipment and other. In addition, the budget narrative must include a justification for each line item. A total dollar amount for indirect charges without a detailed breakdown of individual expenses will not be accepted.** In general, the percentage charged to Title I for any individual indirect cost may not exceed the percentage of clients, based on your organization's total client population, who receive the specific service for which the budget is being presented. For example, the total enrollment for ABC Organization is 500 clients; approximately 20% of the clients are enrolled in the Title I case management program, therefore the percentage of individual direct costs charged to Title I under the case management budget should not exceed 20%. However, the total amount of all indirect costs may not exceed 10%. **Indirect expenses that do not conform to this standard policy will be reviewed in relation to their corresponding justification and adjusted, if necessary, during the contract negotiation process.**

Budget Period

- The budget period must be consistent with the requested budget amount(s) indicated in the proposer's line item budget. All budgets must reflect a 12-month contract period (March 1, 2007 through February 29, 2008). Agencies should not budget with the expectation that other Title I funds will become available through reallocation processes (sweeps) during the year to sustain budgeted costs through the end of the contract period. In other words, if the provider's expenses are not properly covered with the total Title I contract award and no other state, federal, and/or local resources are available to support these costs, then the provider should eliminate and/or reduce expenses to ensure that the program is operating in accordance with its current funding level and not in a deficit.

Direct costs

- Direct costs are those that can be associated with the provision of services directly to the client. Direct service personnel are those who actually provide service to eligible clients. Personnel who complete paperwork for billing and record keeping purposes (with the exception of case managers) are not considered direct costs. Similarly, administrative personnel are not considered direct costs. With sufficient documentation and County approval, some supervisory staff may be considered direct.
- Other allowable direct costs are those items or services that are utilized by direct service personnel or by the clients directly. **The following are examples of other allowable direct costs, by service category:**
 - ✓ **Outpatient Medical Care & Minority AIDS Initiative (MAI) Outpatient Medical Care**
All Physicians, Nurses, Physician's Assistants, Nurse Practitioners, Medical Assistants, Dietitians/Nutritionists, lab tests, medical supplies, immunizations, radiology, P.P.D. costs, medical waste disposal, and beepers for Physicians. Malpractice insurance **ONLY** if it is indicated in the budget justification as such and is indicated as malpractice insurance for individual direct medical personnel listed in the budget is allowable. Consumable medical supplies that are not available through home health care or prescription drugs and those have been prescribed or ordered by the client's primary care physician are also allowable.
 - ✓ **Prescription Drugs & MAI Prescription Drugs**
Cost of actual medications and related supplies necessary for the use of drugs, Pharmacists, and Pharmacist Technicians. Consumable medical equipment and supplies required for administering prescription drugs.
 - ✓ **Dental Care**
Dentists, Hygienists, Dental Assistants, X-ray costs, dental supplies/equipment, sterilization costs for equipment, laboratory costs, medical waste disposal, and insurance.
 - ✓ **Case Management / Peer Education Support Network & MAI Case Management / PESN**
Case Managers, Peer Educators, phones, beepers (if they are specified for the case managers only), fax (if it is specified as being utilized only for case management services), travel reimbursement for the case managers (to and from the clients' homes), supplies (only if it is identified in the budget separately from other general office supplies), and utilities (only in relation to the office space being utilized by case managers or peer counselors to provide direct case management services to clients).

✓ **Substance Abuse Counseling - Residential**

Counselors, Physicians, Nurses, food for the clients, rent (for the housing unit in which the clients reside), psychiatric services, medical supplies, transportation for the clients to and from medical and/or other social service appointments, and regular drug testing.

Cost of food items, packaging material, informational material used to educate clients on nutritional issues, salaries and fringe benefits for personnel responsible for assisting or delivering food to the clients, and cost of vans used to deliver food or pick up food.

✓ **Substance Abuse Counseling - Outpatient**

Therapists, Counselors, telephone and beeper expenses (if related to Title I outpatient substance abuse counseling services), and supplies (if they are specified for the Title I outpatient counseling staff only).

✓ **Mental Health Therapy/Counseling (Levels I and II)**

Counselors, telephone and beeper expenses (if related to Title I mental health therapy/counseling services), and supplies (if they are specified for the Title I counseling staff only).

✓ **Outreach Services & MAI Outreach Services**

Outreach Workers, informational material on available HIV/AIDS services, telephone expenses (if related to Title I outreach services), beepers for Outreach Workers, fax (if it is utilized only for Title I outreach services), travel reimbursement for the Outreach Workers, and supplies utilized in Title I outreach services (only if it is identified in the budget separately from other general office supplies).

✓ **Food Bank & Home Delivered Meals**

Cost of food items, packaging material, informational material used to educate clients on nutritional issues, salaries and fringe benefits for personnel responsible for assisting or delivering food to the clients, and cost of vans used to deliver food or pick up food.

✓ **AIDS Insurance Continuation Program**

Amount used for assistance to clients.

✓ **Insurance Deductible**

Amount used for assistance to clients.

✓ **Prescription Drugs Co-Payments & Co-Insurance**

Amount used for assistance to clients.

✓ **Psychosocial Support Services (Levels III, IV, and Pastoral Care)**

Counselors, telephone and beeper expenses (if related to the provision of Title I psychosocial support services), and supplies (if they are specified for the Title I psychosocial support counseling staff only).

- ✓ **Legal Assistance**
Lawyers, other legal staff providing direct service to Title I clients, court expenses, and document filing fees.
 - ✓ **Home Health Care**
Therapists, Nurses, consumable medical equipment and supplies required for administering prescription drugs.
 - ✓ **Day Care Services**
Actual Day Care Workers and Nurses required to administer medication(s) to program participants, food, day care supplies, equipment utilized by program participants, and transportation for program participants, as allowable by the Ryan White Title I Program.
 - ✓ **Transportation Services (Vans)**
Van Drivers, cost (lease or purchase) of vans used to transport clients, maintenance of vans, and insurance costs. (NOTE: Items purchased at >\$750 are considered property of Miami-Dade County.)
 - ✓ **Transportation Vouchers**
Amount required to purchase vouchers (Discounted Metropass and/or tokens) from Miami-Dade Transit Agency, and salary and fringe benefits for the individual(s) responsible for distributing vouchers.
- In the opening paragraph of the Budget Justification, proposing organizations must indicate the number of clients proposed to be served under the specified service category. Proposing organizations should also include the percentage of clients to be funded by Title I relative to the organization's total client population that will be served during the 12-month contract period.
 - Direct Service Personnel expenditures must be explained by including a brief description of the role of identified staff in the provision of Title I services and the percentage of their salary charged to the Title I budget. Service providers must justify the percentage charged to Title I by indicating the amount of time individual staff members contribute to the Title I program. For hourly or per diem employees, the rate per hour and/or per day must be indicated, as well as the number of hours of work per day/week/month. The methodology utilized by the service provider to arrive at the amount and percentages charged to Title I must be clearly explained.
 - A breakdown of fringe benefits components (including percentages) for each direct service position must be included as part of the justification for each position.

- **Travel** is only allowable for direct service staff and the reasons for travel must be explained and justified. The number of miles and cost per mile must also be indicated. Effective March 1, 2006, the maximum charge per mile as per Miami-Dade County regulations is \$0.445 per mile. Therefore, providers may negotiate a travel rate up to but not exceeding \$0.445 per mile. The methodology utilized by the service provider to arrive at the amount and percentages charged to Title I must be clearly explained.
- **Supplies** are allowable only for the direct provision of services under the proposed program. These costs must be described in detail and the amounts, percentages, and need for each cost must be justified. If necessary, these supplies may be listed as separate line items in the rows labeled "other direct costs." If separately listing the supply item, please clearly and briefly list the name or type of supply (e.g., Other Direct Costs: Paper). The methodology utilized by the service provider to arrive at the amount and percentages charged to Title I must be clearly explained.
- **Equipment** is allowable if it is utilized in the direct provision of services under the proposed program. The type of equipment must be listed and its use for the Title I program must be described and justified. The methodology utilized by the service provider to arrive at the amount and percentages charged to Title I must be clearly explained. An inventory of equipment purchases that are >\$750 per individual item must be maintained by the service provider and reported annually to the Miami-Dade County Office of Strategic Business Management.
- Payments for **Contractual** services such as record reviewers, trainers, etc., must be specified by providing a description of hourly rates, per visit charges, or procedure costs. This explanation must also indicate the number of individuals involved in the Title I program who would fall under this category and the reasons why Title I funds are being used to cover this expense.
- **Generic line items, such as "Miscellaneous," will not be accepted.** Each line item must be clearly identified and adequately justified. If a line item is composed of several related costs, each cost must be itemized separately as part of the justification for that item.
- **Other costs may be considered as direct if they are justified properly and approved by Miami-Dade County.** The item's relation to the direct provision of Title I services must be described as well as the methodology utilized by the service provider to arrive at the amount and percentages charged to Title I.

Indirect/Administrative Costs

- Expenses included in the "**Indirect/Administrative Cost**" category must be individually listed in the budget justification. Please indicate the amount of indirect/overhead/

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ATTACHMENT 14

administrative costs covered by Title I for each applicable line item (i.e., personnel, travel, supplies, equipment, etc.).

- Providers will be allowed to request any amount up to 10% of the Total Amount Requested for each service category to cover administrative and/or indirect costs. This amount is calculated by dividing the total Title I indirect/administrative costs by the total amount requested under Title I for the service category.
- Indirect/Administrative costs must be specified under the "Title I Indirect/Administrative Costs" column utilizing the aforementioned objects class categories.
- **IMPORTANT: Due to Federal requirements, a detailed breakdown of all indirect costs MUST be included on the budget form (except for agencies with a Federally approved indirect cost rate, in which case a copy of the "Rate Agreement" must be included as part of this submission). The 10% indirect/administrative cap applies to those organizations that have a Federally approved indirect cost rate, as well.**

Logic Model and Program Outputs Worksheet

INPUTS (Resources and Constraints) What inputs and resources will be required to achieve the expected outcomes and fully accomplish each activity? Include staffing (responsible parties) and other financial organizational and community resources (e.g., training, space, equipment, etc.), as are reflected within the program budget.	ACTIVITIES (Services) What are the activities to be undertaken? What will the program staff or volunteers actually do for, to, or with the participants (e.g. the specific events, services, interventions, etc., to be undertaken)?	OUTPUTS (# Activities, Participants, Materials – Quality and Quantity) What are the outputs? Outputs are the direct products and evidence of service delivery and the work of the program, including the volume of work accomplished (i.e., number of individuals served; quantity of material services offered; number of classes offered, brochures distributed, etc.).

Logic Model and Program Outcomes and Data Worksheet

OUTCOMES (Benefits for People)		DATA SOURCES AND METHODS OF MEASUREMENT		
What are the expected outcomes of the program? Outcomes are realistic, measurable expected changes and benefits for the population served during or after participating in program services or activities. Outcomes may relate to behavior, skills, knowledge, attitudes, values, condition, or other attributes.		Data Sources and Methods		
		What data sources and methods will be used to measure outcomes and outputs (e.g., self-report surveys, sign-in sheets, observations by staff, etc.)	When will data be collected? (e.g., every week, at program end, etc.)	Whose responsibility will it be to collect and report the data? (e.g., staff position, consultant, volunteer, etc.)

